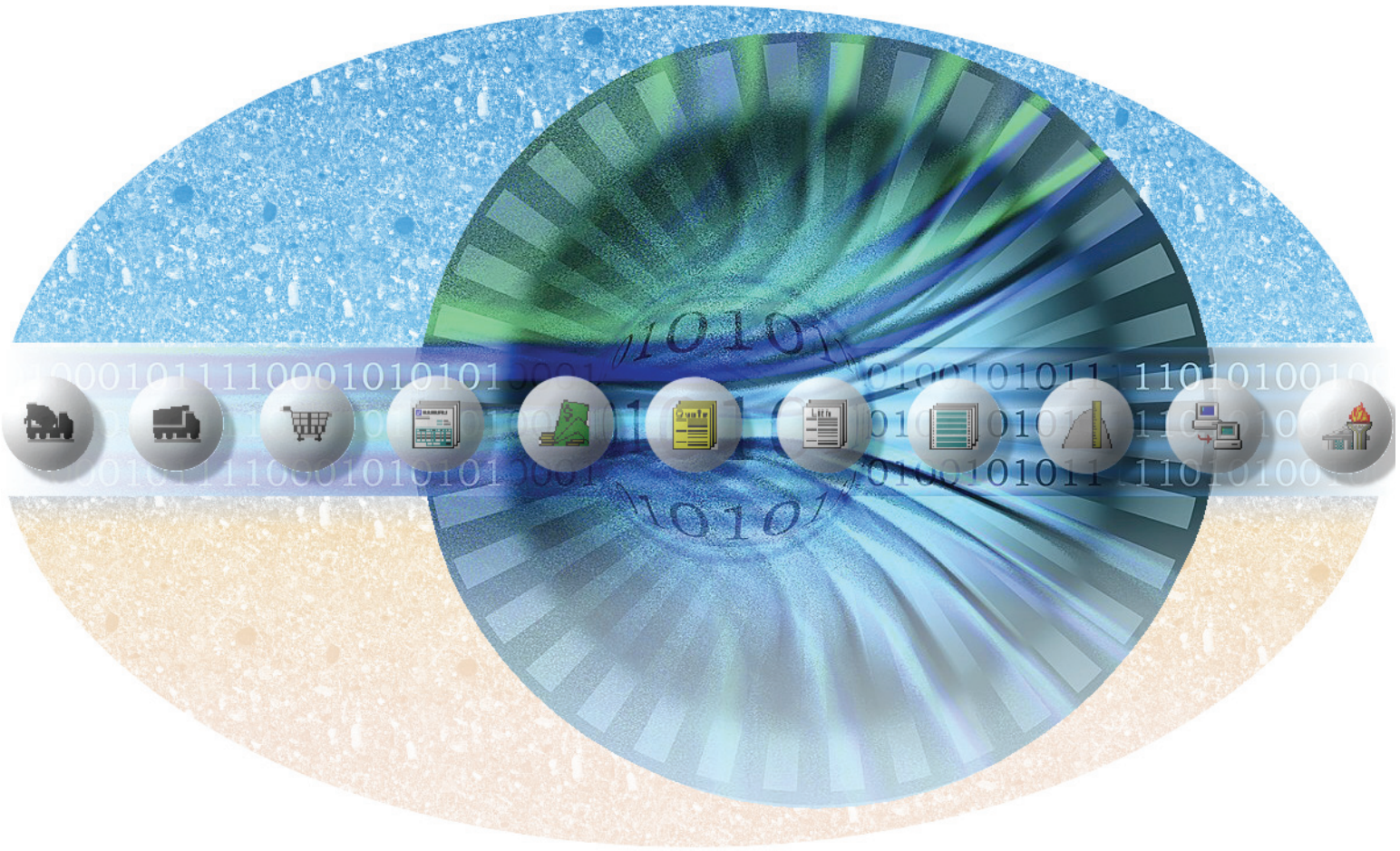
COMMANDseries CS08



COMMANDconcrete Users' Guide

CS08 3.12
3/27/13

Command Alkon

Solutions To Build On

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Contents

Welcome to COMMANDconcrete 13
Product Features 13
How to Use This Document 15
Style 15
Before You Begin 15
Setting Up the System 16
Starting COMMANDseries 16
Logging into COMMANDseries 17
Exiting COMMANDseries 17
Entering Master File Information 17
Toolbars 18
Accessing Help 18
Five Important Functions 19
Entering Dates 19
The <Tab> Key 19
Accepting (Saving) Screens 20
Add Occurrence 20
Detailing 21
SmartLookup 22
Standard Lookup 22
Customized Lookup 23
.NET Fndcode 24
Setup 24
Operations 24
Options 25
Code Lists 28
Exporting Lookup Information 30
The Calendar 31
Order Entry 32
Standard Order Entry 34
Order Haul Information 38
Order Pricing Information 39
Entering Other Order Information 41
Entering Products on an Order 43
Other Order Line Information 50
Associated Products 51
Forecasted Shipped Quantity 52
Scheduling an Order 54
Scheduling an FOB Order 61
Simplified Order Entry 61
Standing Order Entry 64
Entering a Standing Order 65
Switching Between the Standing and Regular Order File 66
Creating Standing Orders from Projects 67
Scheduling Standing Orders 67

Advanced Order & Schedule Tools 70
Customer-Project-Order Lookup 70
The COD Calculator 71
The Volume Calculator 72
Updating Projects from Order Entry 73
Changing Units of Measure 73
Removing Orders 73
Copying and Moving Orders 74
Order Types 75
Suggested Shipping Plants 76
Round Trip Trucking 77
Truck Unavailability 78
Journeys 79
Creating a New Journey 79
Editing an Existing Journey 81
Ticketing a Journey 81
Truck Counts Screen 82
Pouring Methods 83
Order Hold Functions 84
Bid Price Calculator 85
Order-Level Mix Design 87
Product Sales Option 90
The Order Tree 92
Configuring the Order Tree 92
Right-Click Mouse Functionality Using the Order Tree 94
The Options Menu 95
When the Order Entry screen is displayed, the Options menu becomes available. Use the Options menu to navigate quickly to commonly used functions in COMMANDseries.Prefix Screen 95
Switch to Concrete / Aggregate / Block / Asphalt 95
Test Order Print 95
Change Order to Metric 95
Addition/Selection of Notes 95
Re-Verify Credit Limit 96
Default Schedule & Pricing Plants in Order Entry 96
Setup 96
Workflow 98
Economic Sourcing 100
Using Economic Sourcing 100
Notes 102
Pricing Authority - Display Percentage Discount 102
Transport Pricing 104
New Fields 104
System Logic 105
Journeys 105
Creating a New Journey 106
Editing an Existing Journey 108
Ticketing a Journey 108
Multi-Drop Concrete Deliveries 109

Overview 109
Plants Editor 109
Order Entry 110
Ticketing 110
Ticket Report 111
Aggregates Sold Through Ready-Mix Plant 114
Sampling & Testing Plan 116
Configuration 116
Test Methods 116
Concrete Testing Families 116
Item-Testing Methods 117
Users 118
Selection Logic 118
Operations 120
Importing Test Plans 120
Order Entry & Ticketing 121
Rebates and Royalties 124
Configuration 124
Workflow 125
Contact Type Codes 125
Item Editor 126
Jobs/Quotes/Projects > Products Tab 127
Ticketing 129
Update Costs & Prices for Orders & Tickets 130
Reporting 130
Ticketing 133
Ticketing Screen 135
Ticketing — Load Size Logic 138
Reprinting Tickets 138
Canceling Tickets 139
Ticketing With Prebatched Material 140
Maximum Gross Truck Weight 141
Proof of Delivery 142
Process Goods Returned 142
Unscanned Hauler Tickets Report 142
Print Certification Text on Delivery Notes 142
Certification 143
Configuration 145
HTML Tickets 148
Greek Cancelled Ticket Print 150
Next Numbers Editor 150
Plants Editor 150
Ticketing 152
HTML Document Format Interface 154
Post-Production Out of Tolerance Loads 155
Set Up 156
Data In/Out 157
Print/Send Tax & Cement Info to Batching System 159

Setup 159
Record Sampled Tickets 161
Set Up 161
Ticketing 162
Database Fields 164
Future-Day Ticketing 165
Overview 165
Configuration 165
Concrete Ticketing and Shipping 167
Truck Punch In 167
Tracking and Scheduling 167
COMMANDfleet 168
Print User-Defined Fields 169
Web/PDA Tickets and Orders for Trowel-Ready Mortar 170
Overview 170
Order Types 170
Configuration 171
The COMMANDlog Interface 172
Logging In 172
Toolbar 172
Summary Tab 173
Order Tab 174
Tickets Tab 175
Details Tab 176
Controls 177
Importing Tickets at the End of the Day 177
Order and Ticket Data In 177
Automated Data In/Out 178
Tasks, Conditions, and Driver Overtime 180
Tasks 180
Driver Overtime 180
Conditions 181
Tracking & Scheduling 182
Ticketing 182
Deadheading 183
Managing Driver Overtime 184
Time and Task Manager 184
Editing Ticket Times 185
Editing Truck Times 186
Editing Driver Times 187
..... 187
Preliminary Invoice Register 188
Saving Report Configurations 188
Printing a Priced Orders Report 189
Summary Pages 191
Printing an Exceptions Report 192
Exception Items Only Option 192
Printing a Preliminary Detail Invoice Register 193

Preliminary Summary Invoice Register 195
Transfer Orders Register 195
Suspending Orders and Tickets 199
Manual Suspension of Orders, Tickets, or Products 200
Automatic Customer Suspension of Orders 201
Exception Suspension 201
Suspended Orders & Tickets Report 201
Releasing Suspended Orders & Tickets 202
Editing Suspended Tickets on Invoiced Orders 203
Edit Orders and Tickets 205
Edit Orders and Tickets Screen 205
General Order & Ticket Prep 206
Order Pricing Information 209
Other Order Information 211
Order Haul Information 212
Editing Tickets 213
Removing Items 217
Removing/Editing Charges 218
Credit & Debit Memos 220
Credit Memos 220
Debit Memos 222
Options Menu 224
Change Order to Metric/Customary 225
Ticket Times 225
Reprinting Tickets 225
Display Individual Ticket 226
Display Taxes 227
Display Haul Charges 227
Suspend Order/ Suspend Product/Edit Suspended Tickets 227
Addition/Selection of Notes 228
Daily Invoicing 229
Process Overview 229
Reconciling Tickets 230
Price Updates 233
Update Costs & Prices for Orders & Tickets 233
Calculate Unloading Charges 235
Create Orders for Separate Invoices 236
Price Review 236
Run a Priced Orders Report/Preliminary Invoice Register 237
Update Cartage Tickets 237
Zero-priced Exception Items Only Report 238
Invoice Print (if licensed) 239
Post to Receivables (if licensed) 239
Plant-level Invoices for Cash Sales 239
Configuration 239
Operations 241
Order Discount Form 243

Cash Management 246
Configuration 246
Next Numbers 246
Bank Codes 247
Contact Types/Contacts 248
Plants 249
Main Tab 249
Communication Tab 249
Next Numbers Tab 250
Users 250
Cash Management–Order Entry 251
Entering a COD Order 251
Quick Customer Entry 252
Payment Entry 252
COD Orders 253
Open Payments 255
Receipt Allocation 256
Emergency Cash Receipts 259
Cash Management Tools 259
Cash Reconciliation 260
Cancel Cash Reconciliation 262
Reconciliation Report 263
Uncollected Tickets Report 264
Unallocated Receipts Report 264
Document Formats 265
Purging Quick Customers 265
Purge Records 266
Reports 267
Direct Deposits 268
Configuration and Workflow 268
Cash Reconciliation 269
Preliminary Reconciliation Report 270

Customer Notes 272
Types of Notes 272
Entering Notes 273
Managing Customer Notes 276
Notes Listing 277
Dispatch Memos in Order Entry 278
Configuration 278
Operations 279
Reports 281
Deleting, Managing & Purging Completed Notes 281

COMMANDconcrete Reports 283
Generating Reports 283
Scheduling Reports 286
Order Schedule Report 286

Truck Demand Graph 287
Plant Loading Report 288
Driver Callout Report 288
Dispatch Sheet Report 289
Dispatching Reports 290
Order Report 291
Ticket Report 291
Enhanced Ticket Report 292
COD Recap Report 295
Order Recap Report 297
Plant Production Report 298
Customer Sales Recap Report 298
Inventory Usage Report 298
Product Sales/Usage Report 299
Raw Materials Requirements Report 299
Batching Comparison Report 300
Batch Info Report 300
Order Audit Log Report 301
Time Analysis 301
Driver Times and Truck Times 302
Order Snapshot Report 302
On Time Delivery Report 303
Time Analysis Reports 303
Missing Times Report 305
Overtime Report 306
Payment Option Reports 307
Reconciliation Report 307
Uncollected Tickets Report 308
Unallocated Receipts Report 308
..... 309

Application Management 310

Calculate a Price Change 310
Mix Design Interface - QA 313
Initialize TESYS Data 313
Batch Interface Queued Tickets 314
Batch Code Generator 314
Edit Project Expiration Dates 315
Lien Legacy Invoice Manager 315
Realign Accounts and Cost Centers 316
Error Log Report 318
Update Zone Salesman 318
Update Inactive Customers 319
..... 320

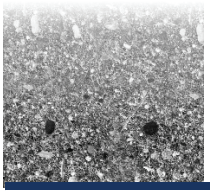
Materials Manager 322

Key Features 322
Material Manager Setup 322
System License 323
Lab Location 323
Sort Codes 323

Item Setup 325
Material Manager Screen 326
Filtering Items 326
Mixes 327
Constituent Tabs 327
Item Replacement 328
Mix Design 335
Mix Design Screen Layout 336
Using a Generic Mix 339
Item Substitution 341
Constituent Replacement Log 343
Data Management 345
Initialize/Analyze Files 345
Import Data 346
Export Data 348
Import Orders & Tickets 349
Export Orders & Tickets 350
Automated Data In/Out 351
Data Maintenance 353
Retrieve a Specific Record or Set of Records 355
Global Replace 357
Special Search Operators 358
Automatic Database Updates 358
Manual Database Updates 362
Upgrade Options 363
List of Manual Updates 364
Maintenance Routines 369
SQL Worksheet 372
Database Locks 373
Service Control 374
Comm Manager Console 375
Console 375
Prompt Type 376
Context Menu 376
Network tab 377
Logging Functions 377
Run Comm Managers as a Windows Service 377
Auto-Signaling 379
..... 379
Appendix A: Examples 380
Multiple Loads on One Truck 380
Two Mix Products on One Truck 382
Scheduling an Order out of Multiple Plants 383
Batching for Third Parties 387
Third Party Customers 388
Third Party Customer Projects 389

Third Party Company Document Formats 390
..... 391
Appendix B: Credit Checking 392
Credit Checking Overview 392
Standard (no license needed) 392
Credit Checking (licensed feature) 394
Credit Checking Configuration 394
Credit Codes 394
Reason Codes 395
Assigning Customer Credit Codes 396
Using the Credit Checking Function 397
Appendix C: Order-Level Mix Design 400
Order-Level Mix Design 401
Mix Design Interface - QA 404
Ticketing 405
Automatic Caller ID 407
Configuration 407
Workflow 408
Manual Lookup 410
Contact-Deliver To-Customer Order Lookup Form 410
Truck Ahead-Truck Behind 414
Document Tags/Formats 415
Signaling Units 415
Appendix F: SAP On-line Ticket Interface 418
Plant Configuration 418
Operations 418
.....Ticket Creation 418
..... Ticket Removal 419
Ticket Reactivation 419
XML Formats 419
COMMANDseries 419
ERP Server Output 420
Appendix G: Batch Confirmation and EU Link Enhancements 422
Logic 423
Setup 423
Add New Reason Code 423
Set Configuration 424
Plants Editor 424
Items Editor 425
Concrete Ticketing & Shipping Screen 426
EU Generic Link Field Updates 426
Generic EU Link Enhancements 427
Ticket Weights Confirmation 428
Ticket Print 428

Appendix H: Counter Sales (Cash and Carry) 430
Cash & Carry Orders 430
Cash & Carry Configuration 430
Cash & Carry – Order Entry 431
Cancelling an Order 433
Appendix I: Assigning Mixes to Technical Products 434
Concrete Classes & Specifications 434
Configuration 435
Item Lookup 435
Reason Codes 436
Material Classes 436
Items Editor 436
Appendix J: Validate Reused Concrete 438
Setup 438
Reason Codes 438
Configuration 438
Appendix K: Lime Spreader Functionality 1
Overview 1
Background 1
General Notes 2
Items Set Up 2
Item Groups 2
Item Category 2
Items Editor 3
Assigning Item Groups to Customers and Projects 5
Projects Editor 6
Hauler Editor 7
Order Entry 7
Cartage Changes 8
Cartage Sequence Code 8
Removing an Original Cartage Ticket 9
Update Cartage Ticket Changes 9
Terms Code Modifications 12
Edit Orders and Tickets 13
Appendix L: Quantity Discounts 1
Overview 1
Configuration 1
Price Categories 1
Items 1
Workflow 2
Projects 2
Order Entry 2
Invoice Prep 3
Index 4



Welcome to COMMANDconcrete

Welcome to the *COMMANDconcrete User Guide*. The COMMANDconcrete software package is designed to establish sound ready-mix dispatch control, improve customer service, reduce delivery costs, decrease the dispatcher's workload, provide immediate management reports, and capture information for invoicing and accounting.

Product Features

- Allows entry of orders for the current day or multiple dates.
- Retains past orders for future reference or copying.
- Allows orders to be canceled, reactivated, moved to a different date, or duplicated today or in the future.
- Allows inclusion of extra product and admix sales. These products can be varied from one ticket to the next.
- Permits toggling between Order Entry and Ticketing without losing information.
- Estimates the required volume for slabs, footings, slabs with integral footings, walls, columns, and steps with the volume calculator. If the calculated volume is accepted, it will default into the quantity ordered field.
- Provides for unique ticket formatting during system setup to provide flexibility.
- Allows orders with multiple mixes and/or non-mix products.
- Prints tickets at the plant within seconds of the dispatcher's demand.
- Automatically prices, extends, and taxes COD deliveries, and displays the amount the customer owes.
- Allows tickets to be canceled, uncanceled, or retyped.
- Provides valuable information on daily activity reports for the current day's and prior day's orders, production, and deliveries. These reports can be directed to the screen or any printer.
- Allows for easy ticket editing.
- Permits changing of the map page, zone, distance, job number, purchase order number, and order status from the ticketing screen.
- Applies minimum load charges.
- Automatically pulls up load information, and defaults load quantities to ticketing.
- Allows change of delivery date.
- Allows typing of temporary tickets and test tickets.
- Allows for ticket reprint, next ticket number display, and ticket retrieval.
- Offers easy access to data through drop-down menus and lists.

- Allows project or job information to default into Order Entry so the order can be entered quickly.
- Handles dumped and resold concrete.
- Handles GST/PST taxing issues for intangible products.
- Prices products sold according to various pricing formulas. These formulas include quotes by project, customer, discount, etc. Prices for minimum loads and other special charges can be determined.
- Provides Sales, Dispatch, and Time Analysis Reports.
- Computes taxing according to user defined tax formulas.
- Creates a priced order register which prints price, tax, and extended orders for validation prior to editing the data.
- Allows editing of all past orders and tickets.
- Exports data to third-party invoice accounting systems. The data can be tailored as required.
- Supports a caller ID interface to easily look up contacts when they call the office.

How to Use This Document

This section provides guidance so you can more easily locate information within our manuals.

Topics in this section:

Style
Before You Begin
Setting Up the System
Starting COMMANDseries
Accessing Help
Add Occurrence
Detailing
SmartLookup
.NET Fndcode
Five Important Functions

Style

This document uses a style designed to help you identify specific functionality.

- **Button** names are capitalized and bold. For example:

  Select the **Pricing** button.

- **Field names** are capitalized and bold. For example:

  Enter the **Order Code** in this field.

- **Forms** (also called screens or windows), **Menu** names, and **Options** are capitalized. For example:

  On the Edit menu, if you select Volume Calculator, the Item Code screen may appear first.

- Required **user input** examples use Courier New plain. For example:

  Enter `123 Main Street` in this field.

- Braces and arrows { > } indicate how to navigate to a specific screen. For example:

  To navigate to the **Tickets** screen, go to the **Dispatch** menu and select **Tickets** from the drop-down menu {Dispatch > Tickets}.

Before You Begin

The COMMANDseries client runs under Windows 2000 or Windows XP Professional Edition. If you are not comfortable using Windows, you will not feel comfortable using

COMMANDseries. It would be helpful to spend some time acquainting yourself with the environment.

Certain functions are unique to COMMANDseries. To help you with these functions, we have provided a **COMMANDseriesGetting Started in the Workplace** manual. This manual will show you how to work effectively in COMMANDseries applications. We encourage you to look through the manual before you begin working in the system, and we also hope that you will refer to the manual when questions about the functionality of COMMANDseries arise.

Setting Up the System

COMMANDseries manipulates a large database of information, and most of this data is unique to your construction materials business. For COMMANDseries to efficiently and properly operate, a basic set of information must be entered before you can perform your daily tasks with the system. Files such as products, plants, trucks, and customers must be entered, along with files pertaining to taxes, minimum load charges, and accounting periods. There is a large amount of information that must exist before you can begin using COMMANDseries.

With this in mind, Command Alkon has provided a **Setting Up the System** document to assist you as you enter the information that will make your system unique to your business. As the size of the Setting Up the System document shows, there is a great deal of information to enter. However, once this initial information exists in the system, the only products, projects, customers, etc. that you will have to enter are new ones.

Properly built files make COMMANDseries extremely easy to use. The information you need is either already in place or just a mouse click or keystroke away.

Starting COMMANDseries

There are several ways to start your COMMANDseries applications:

- Select COMMANDseries from the Windows **Start** menu.
- Select the application module icon from the COMMANDseries Program group in Windows Explorer.
- Select the COMMANDseries shortcut on your Desktop.
- Implement the COMMANDstart feature, which starts COMMANDseries automatically upon start-up of your computer.

After entering a COMMANDseries program, you can switch to another COMMANDseries application by selecting the program from the **Alternate Menu** list in the **Misc** drop-down menu of all COMMANDseries applications.

When COMMANDseries is loaded, it tests for the presence of COMMANDnetwork. If COMMANDnet is not running, COMMANDseries will launch it automatically.

Topics in this section:

Logging into COMMANDseries

Exiting COMMANDseries

Entering Master File Information

Logging into COMMANDseries

Effective with version 5.57.7, COMMANDseries provides two different options for user verification.

Windows Security

This option integrates COMMANDseries security with Windows security. When you launch COMMANDseries, the program retrieves the current Windows username and validates it against the COMMANDseriesUser list. If the Windows username matches a COMMANDseries user, that user is automatically logged onto COMMANDseries. No username/password entry is required.

COMMANDseries (Standard) Security

After launching COMMANDseries, you are prompted to enter a username and password.

Note: Usernames and passwords are set up by your system administrator.

To log into COMMANDseries:

1. Enter your assigned username in the **User** field and press <Tab>.
2. Enter the assigned **Password** and press <Tab>.
   The COMMANDseries application module opens.

Exiting COMMANDseries

There are several ways to exit COMMANDseries:

- Click the **Exit** button in the upper right portion of the screen
- Press <Alt+F4>
- Select **Exit** from the leftmost menu. The name of the menu depends on the current module; in Concrete or Aggregate, for example, it's **Dispatch**, but in Receivables, it's **Transactions**.

A screen appears which asks you to confirm that you want to close, the program entirely, restart the program entirely, or close all open forms and log on as another user.

Entering Master File Information

Once inside the application, you will find that most of the screens used to enter Master File information are located in the **Files** menu.

The menu options under the **Files** menu vary from module to module. If, for example, you want to create or modify A/R accounting periods, you need to be in either COMMANDinvoicing or COMMANDreceivables—**A/R Accounting Periods** will not be an option if you are in COMMANDconcrete.

Toolbars

Use the mouse to quickly execute common commands. The Toolbar displays changes according to the necessary commands for the current active screen. To identify an icon, point to the button and note the tool tip that appears.

Toolbar Icons

To perform a task included on the toolbar, simply click the button with the mouse. For example, to exit from the current screen, click on the **Exit** button.

Standard Toolbar buttons

	Accepts the current screen		**Opens** a screen assigned to the icon (such as Orders)
	Exits the current screen		**Clears** the current screen
	Opens a **Save As** screen		Opens a **Request & Search** screen
	Deletes the current screen		**Sorts** the entries of a list
	Prints the current screen		Opens **screen-specific** help
	Opens a **Search** screen		Opens **keyboard-specific** help
	Runs the **Replication** Filter		Opens the **Help** file

Other buttons can be added to the toolbar on the Preferences screen. {Misc > Preferences}

Accessing Help

There are several ways to access the online Help while working in COMMANDseries:

- For help specific to the screen in which you are currently working, press <Ctrl+Alt + F1> or click the **Screen Help** icon on the toolbar.
- For help with the functions of the keyboard, press <Shift+F1> or click the **Keyboard Help** icon on the toolbar.
- From any COMMANDseries application, click on the **Help** menu located on the far right of the COMMANDseries menu bar. Select a specific help function, such as Screen Help, Keyboard Help, Contents, How to Use Help, or the About window.
- From the COMMANDseries Program Group in the Windows menu, select the **Help** icon.

Five Important Functions

COMMANDseries has a wide variety of tools and commands, and new users can easily find themselves overwhelmed by the different options. Despite the large number of options, four commands will serve you in most situations.

Entering Dates

The <Tab> Key

Accepting (Saving) Screens

Add Occurrence

Detailing

Entering Dates

You enter a lot of dates in COMMANDseries, and you have a great deal of flexibility in how you enter them:

- <Tab> through the field to enter the current date.
- The days of the week are numbered 1-7, with 1 being Monday. Entering a number between 1-7 will enter the next occurrence of that particular day. If it is Wednesday, September 27, and you enter a 4 (Thursday), the system will convert that to September 28. If, however, you enter 3 (Wednesday), the system will convert that to October 4—the next occurrence of Wednesday.
- Enter the first three letters of the day. The system will enter the next occurrence of that day.
- Enter +1 for tomorrow's date, +2 for the day after tomorrow, etc.
- COMMANDseries recognizes standard date separators. You can enter January 3, 2009 as 1/3/09, 1-3-09, or 1.3.09. You can also omit separators altogether; however, when omitting separators you should include leading zeroes to prevent any confusion: 010309. If no year is specified, COMMANDseries will default the current year.

The standard display format, as well as the default on the Date Order (Month before day or vice versa) is configurable at both the system (Configuration > Defaults) and user (Preferences > Users) level.

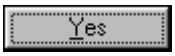
The <Tab> Key

COMMANDseries is a form-based program – most screens are essentially simply forms. To move from field to field, press <Tab>. Doing so will move the flashing cursor (which may also be referred to as the focus) through the entire form.

There are a couple of additional things to remember about the <Tab> key:

- <Shift+Tab> takes you back one field, which can be useful if you overshoot your target.
- The cursor not only moves from field to field, but also moves across the buttons on the screen. If the cursor is resting on a button, a faint box appears inside it.

The cursor is on this button.



If you can't find the cursor in a field, look at the buttons. If the cursor is on a button, you can access the button by pressing <Enter>.

- For a standard keyboard, COMMANDseries remaps the numeric keypad <Enter> key to function as a <Tab> key. This mapping allows for more efficient data entry. This remapping is only for COMMANDseries; in most other programs, the key functions as a standard <Enter> key.

To issue the <Enter> command, use the main <Enter> key (the one that is equivalent to <Return> on a typewriter). This key is sometimes referred to as the "Center Enter" key.

Accepting (Saving) Screens

Throughout COMMANDseries you will often need to save your work (also known as committing data to the database). There are a host of different screens in COMMANDseries, but they all have one thing in common: the **Accept** command. The Accept command is the same as **Save**, **OK**, **Execute**, etc. There are a number of different ways to accept a screen:

- Pressing <F2> is the most common method.
- Clicking on the toolbar **Accept** button (a green checkmark).
- Selecting the File > Accept menu option.
- Clicking on the screen's **Exit** button. When you close a screen that contains new or changed information, a dialog box displays, asking whether or not you want to save this new information.

Because the command "Accept" does not refer to a single button or key, in the documentation, the word accept will not have any special formatting. For example, "you must accept the screen to continue."

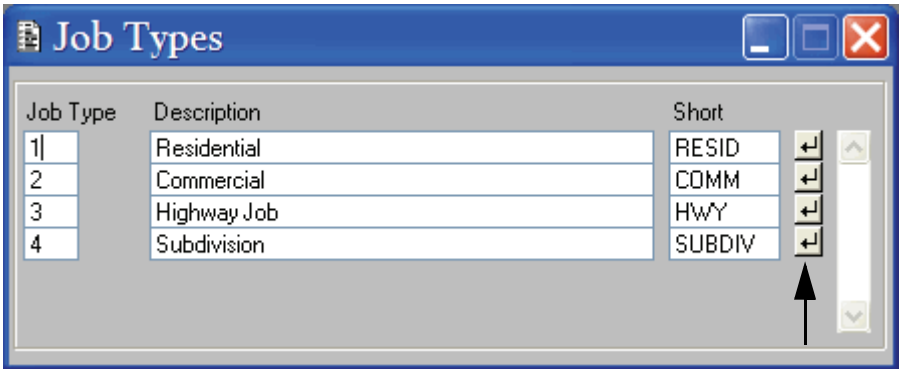
Add Occurrence

Many forms in COMMANDseries call for varying amounts of data. For example, one order might have only one item, but the next might have four.

For any situation in which you finish entering something and say, "I need to enter another one of these," use the **Add Occurrence** button. The hooked arrow on the button is taken from the symbol on a typewriter's <Return> key—the key you pressed whenever you needed a new line. Anytime you see it, you can select it to create another line for data entry.

For example, if you are entering job types and need to enter a new one, press the **Add Occurrence** button:

Example of the Add Occurrence button



Detailing

Many COMMANDseries fields link to other data sources. For example, the **Customer Code** field on the **Order** screen is linked to the Customer file, item codes to the Item file, etc. Such fields will only accept values that already exist in those linked records.

Sometimes you know what needs to be entered in these fields; in those cases, you can simply enter the data, press <Tab>, and move on. However, sometimes you need to look up the appropriate entry, such as a Customer Code, an Item, a charge table, etc. If you need to look up an value from a list of available options, press <Enter>. A form will display a list of selections available for that field.

Some fields allow for more advanced lookup options. These options are discussed in the next section, *SmartLookup*.

Some fields also have small buttons next to them that have the same effect:

Example of fields with detail buttons

These small buttons are called detail buttons. Clicking on the detail button will do the same thing as pressing the <Enter> key. In this example, to retrieve a list of all the architects in the system, you could either:

- Press <Tab> until the cursor is in the **Architect** field, then press <Enter>

  -or-

- Click on the detail button to the left of the **Architect** field, regardless of the location of the cursor.

The act of bringing up a list of available choices, whether by using the detail button or the <Enter> key, is referred to as “detailing on a field.”

Some types of fields have specialized detail buttons, such as date fields:

Example of a Date button

Even though the button is different, its place to the immediate left of the **Order Date** field lets you know that it is a detail button.

SmartLookup

Many COMMANDseries procedures involve entering codes. It is important that you feel comfortable finding customer-related information in the system. These directions are based on an order entry screen; however, this procedure will work anywhere you have to enter a customer code.

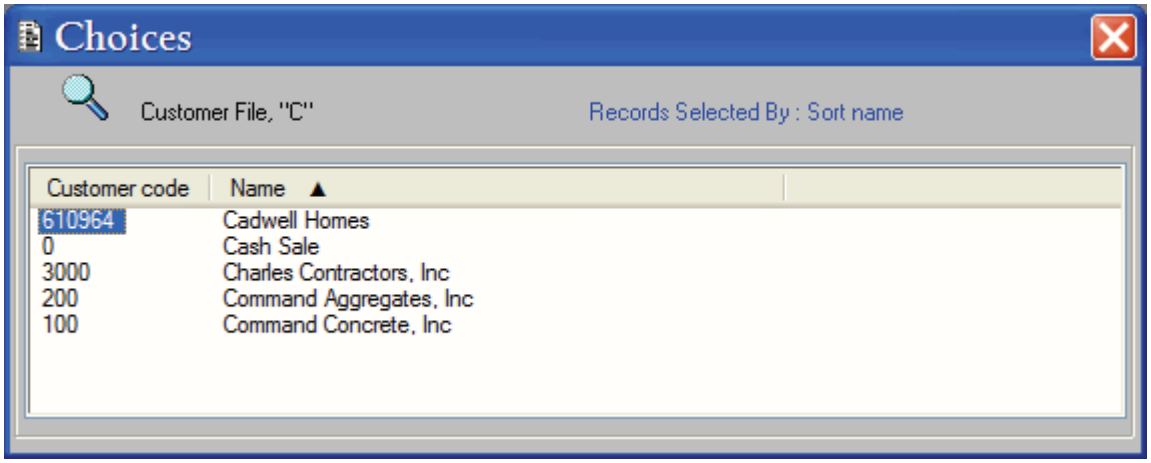
SmartLookup is available for many fields which are linked directly to a database tables.

Standard Lookup

To look up a customer code:

1. Enter the first few characters of the customer's Sort Name, and press <Enter>. The system will display a list of all customers whose Sort Name begins with those characters:

Customer Lookup



   The lookup screen displays reference information above the actual list:
   - The active lookup file (Customer)
   - The entered search string ("C")
   - Sort key (Records selected by: Sort name)

2. Double-click on the Customer Code to load a specific customer into the active editor.

- If only one customer matches the entered search string, it will be automatically loaded into the active screen.
- If the search finds more than 5000 matching records, the system will warn you with the message, **`This listing will retrieve more than 5,000 records and will take longer than normal.`** Cancel and Continue buttons will allow you to decide whether to continue with the lookup.

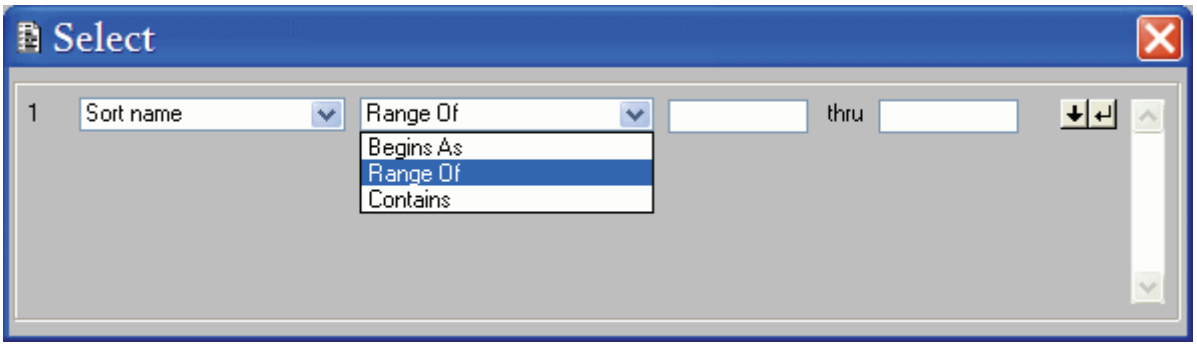
Customized Lookup

In some cases, you may need to modify a search.

To modify a lookup search:

1. The search configuration screen can be called in one of two ways:
   - Leave the **Customer Code** field blank and detail on the field.
   - With the lookup results on screen, select the **Select** button on the COMMANDseries toolbar.

Select screen (FNDCODE)



This screen lets you search for customers using one or more search parameters. Each search parameter has its own line. The first field lets you select the field you wish to key on. The **Customer Sort Name** is the default value, but you can select other options by selecting the field and choosing another field from the drop-down list.

2. The next field determines how you wish to search through that field. The options are:
   - **Begins as** - Looks at the beginning of each field entry for the specified search string. This is most useful for searching for names, as opposed to numbers.
   - **Range of** - Similar to **Begins as**, but provides a second field for a search string, which allows for broader searches.
   - **Contains** - The system looks through the entire field for the search string, as opposed to just the beginning.
3. In the field to the right, enter the search string. If **Range of** is the search option, there will be two fields in which to specify the range.
4. If you wish to specify more search criteria, press the **Add Occurrence** button and then place your cursor in the next field (to the right of the number 2). If not, accept the screen and proceed to step 6.
5. You can specify up to 10 criteria. When you are finished, accept the data you have selected.
6. The **Choices** screen will display the customers that match your criteria.
7. When you have located the customer, either double-click or highlight the desired customer and press <Enter> to accept. The **Choices** screen will close and the selected customer code will be entered into the form.

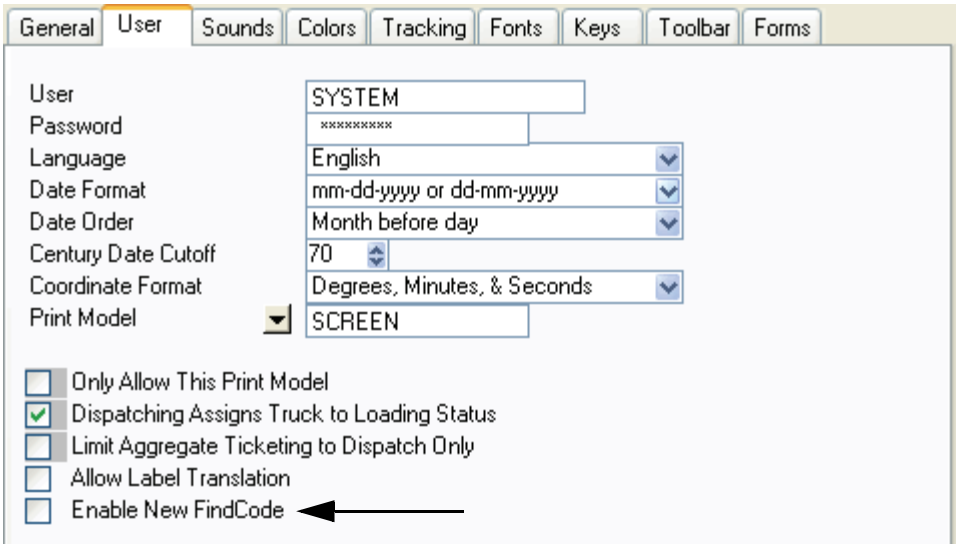
.NET Fndcode

A .NET version of FNDCODE, the COMMANDseries lookup utility, is now available. This new utility provides additional functionality as well as greater flexibility as COMMANDseries continues to develop.

Setup

Users can choose between the old lookup screen and the new lookup screen on the User-Preferences tab:

User Preferences (SYSPREF2)

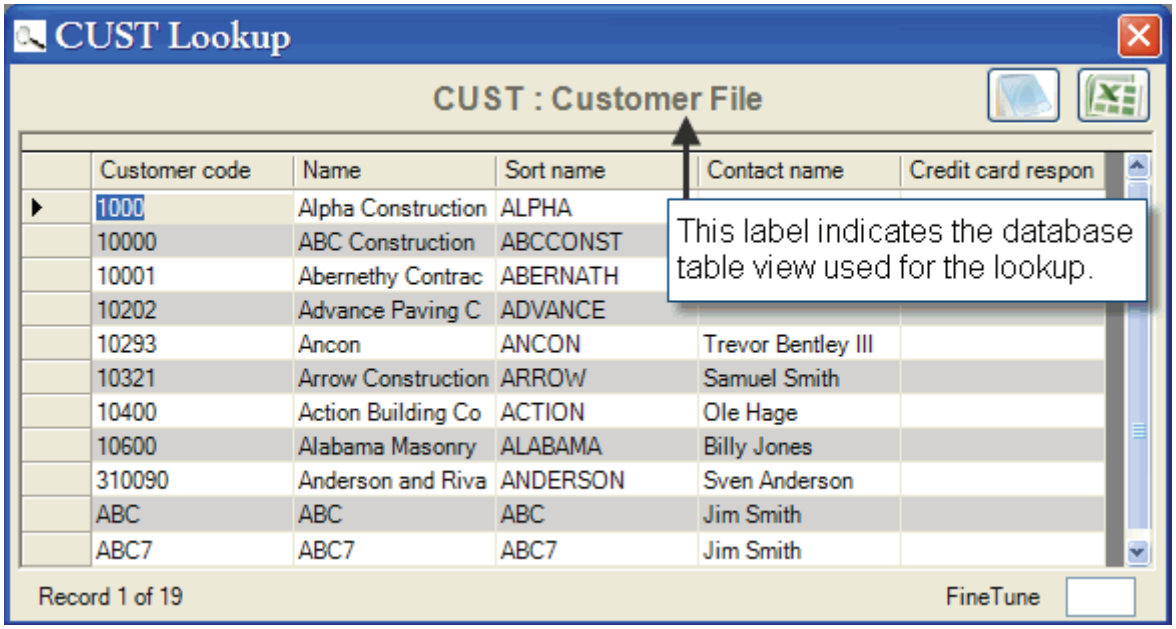


If this option is selected, the new .NET lookup system will be used. If it is not selected, the old lookup system will be used.

Operations

The new lookup is invoked by detailing on a lookup field, just like the old method. SmartLookup is still in place; if you enter a string into the field, the lookup will search for that string.

Customer lookup, "A"



To load a record, double click anywhere on the line; in the CS08/Uniface lookup, you had to double-click on the Primary Key field (in this case, the Customer Code). You can also select a record using the up/down arrow keys.

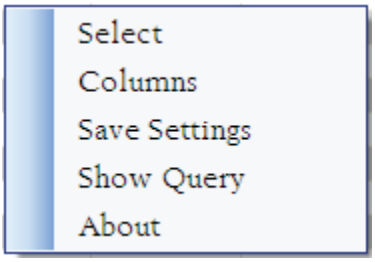
The screen supports basic Windows functionality:

- Clicking on a column header will sort the list on that column. Clicking on the column again will toggle between ascending and descending sort order.
- You can resize a column either by dragging the separator between column headers, which allows you to set the column width as desired, or by double-clicking on the separator, which automatically sets the column width to the width of the longest field in the column.
- You can rearrange the columns by dragging and dropping the column headers.
- You can enter a different search string in the Fine Tune field; the lookup list will update automatically. Anything you type will automatically go into this field.

Options

If you right-click anywhere on the screen but the title bar, the options menu will display.

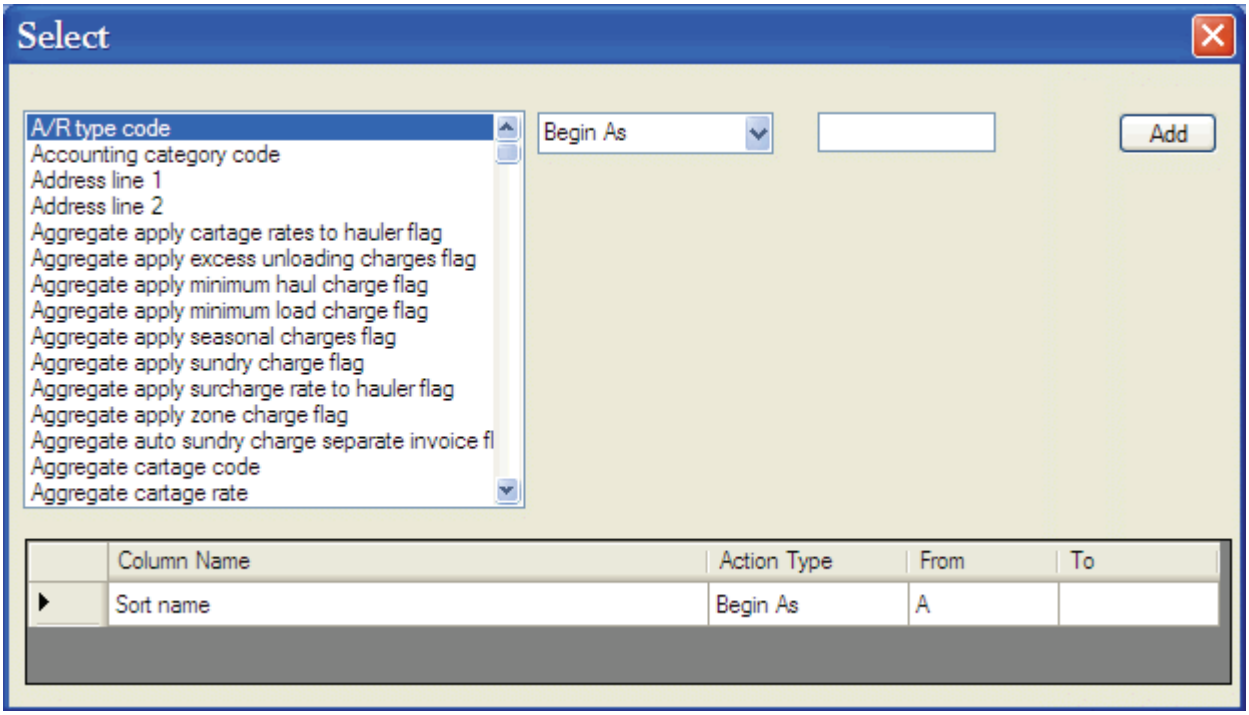
Options



Select

The Selection screen provides the ability to modify the selection criteria.

Lookup-Select



Column Name – The drop-down box allows you to specify a field from the primary lookup table. On a customer lookup, for example, you can filter on any field in the CUST table.

Filter – Allows you to select a filter type:

- Begin As
- Contains
- Range Of
- Equal to

From – Enter your search string. If your Filter is Range Of, the **To** field will be active.

Once you've entered the column criterion, Add the operator to the search window at the bottom.

When your search is complete, accept the screen. To establish a default search setup, open the Options menu and select **Save Settings** before accepting the screen. To close the screen without performing a search--retaining the existing lookup results--select **Exit** from the Options menu, or simply X out of the screen.

Columns

The columns option allows you to specify the columns to be displayed.

Columns

ICAT : Item Category File

	Item category	Description	Short description	Item type
▶	CRY1	CRY1	CRY1	Other Product (13)
	1	Concrete, Metric	CONMET	Concrete (01)
	2	Concrete, US	CONCUS	Concrete (01)
	3	Cement, Metric	CEMMET	Cement (21)
	4	Cement, US	CEMUS	Cement (21)
	5	Cementitious Materials, Metric	CMTSMET	Cementitious Material (03)
	6	Cementitious Materials, US	CMTSUS	Cementitious Material (03)
	7	Sand, Metric	SNDMET	Aggregate (Fine) (24)
	8	Sand, US	SNDUS	Other Product (13)
	9	Coarse Aggregates, Metric	CAGGMET	Aggregate (Coarse) (04)
	10	Coarse Aggregates, US	CAGGUS	Aggregate (Coarse) (04)
	11	Water, Metric	WTRMET	Water (05)
	12	Water, US	WTRUS	Water (05)
	13	Air Entraining Agent, Metric	AEAMET	Air Entraining Agent (06)
	14	Air Entraining Agent, US	AEAUS	Air Entraining Agent (06)
	15	Accelerator - Non-Chloride, Metric	ACCNCMET	Accelerator (07)
	16	Accelerator - Non Chloride, US	ACCNCUS	Accelerator (07)

Record 1 of 47

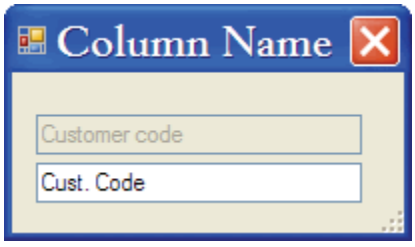
The left column displays all of the fields available for display. The middle column lists the current fields, and the right column shows the database name of those fields.

To add a field, either double-click on the field in the left column or select it and press the right-pointing double arrow.

To remove a field, select the field in the middle column and press the left-pointing double arrow.

By default, the middle column shows the standard database label for each field. That name will be used as the column header in the lookup display. If you want to change that label, double click on the label.

Changing Column Labels



Enter the new label and accept the screen.

Once you've finished modifying the columns, accept the screen to enact the changes in the lookup screen.

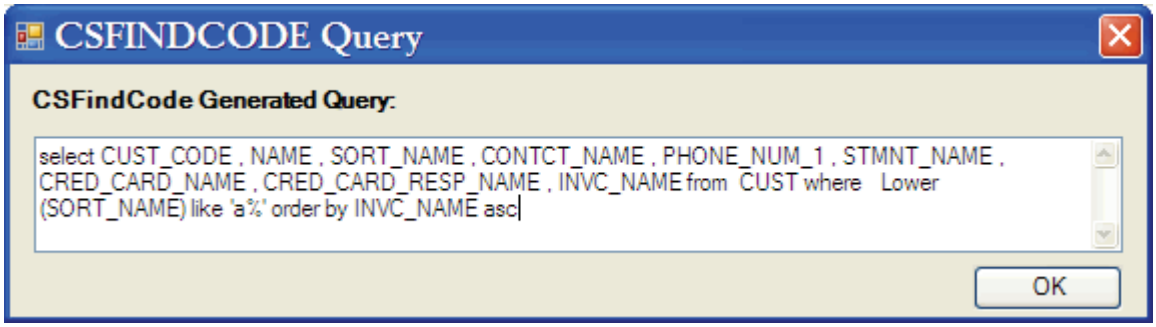
Save Settings

This command will save the configuration of your current lookup for future use. Configurations are maintained for each lookup–customer, item, order, etc.

Show Query

The Show Query option displays the actual SQL query command that was used to generate the current list.

Show Query


CSFINDCODE Query
CSFindCode Generated Query:
select CUST_CODE , NAME , SORT_NAME , CONTCT_NAME , PHONE_NUM_1 , STMNT_NAME , CRED_CARD_NAME , CRED_CARD_RESP_NAME , INVC_NAME from CUST where Lower (SORT_NAME) like 'a%' order by INVC_NAME asc
OK

This option is primarily used as a troubleshooting tool.

Note: You cannot enter new queries in this screen.

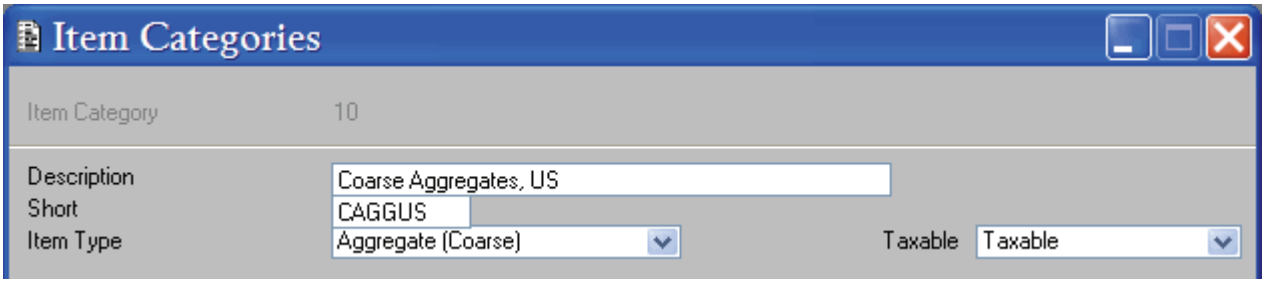
About

This option displays the information screen for FNDCODE.

Code Lists

Many fields in COMMANDseries, such as the Item Type field in the Item Category editor, are Code List fields.

Item Category editor (EDTICAT)



When you look at the **Item Type** drop down, you see descriptions of different item types. But when you select one, a numeric code is saved in the database–that code is linked to a code list. This method of data storage saves space–only two characters per item type are required, as opposed to a 20-30 character description. Multiply that difference by several thousand, and you can better appreciate the practice.

The downside of this method is that previously, if you were to retrieve an item category record in Data Maintenance, all that would be listed in the Item Type field would be a number–which doesn't help.

The new Lookup screen can include both the field value and the associated label for code list fields. To enable this feature, you simply have to import data into two tables, CDLS (Code Lists) and MSGS (Messages). These two files are located in the **`CMDSERIES\Import`** folder.

Once they have been imported, code list fields will be displayed in the lookup field by the description, followed by the code in parentheses.

Code Lists (Item Type)

ICAT : Item Category File

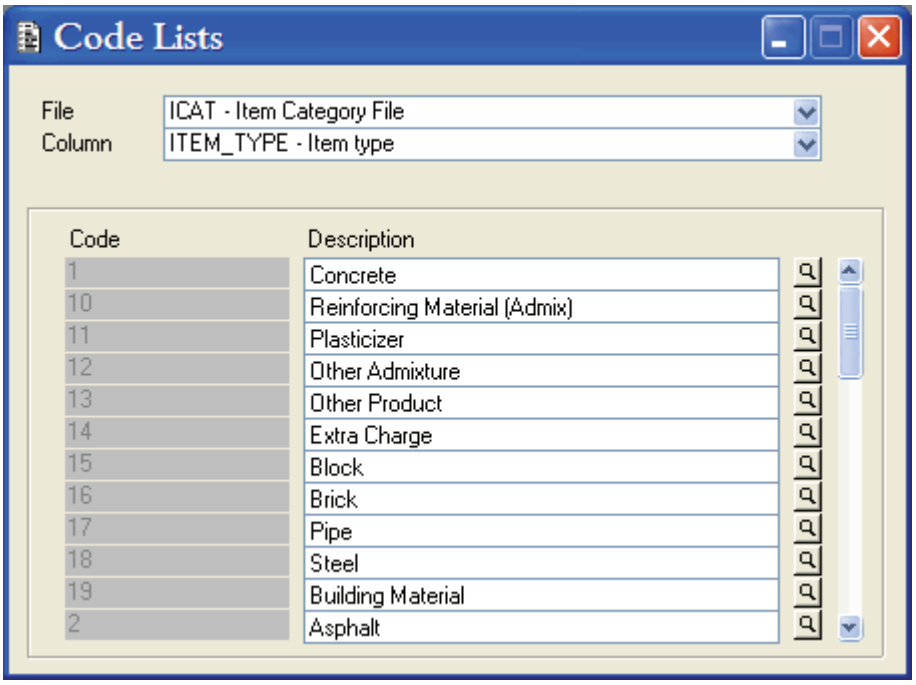
	Item category	Description	Short description	Item type
▶	CRY1	CRY1	CRY1	Other Product (13)
	1	Concrete, Metric	CONMET	Concrete (01)
	2	Concrete, US	CONCUS	Concrete (01)
	3	Cement, Metric	CEMMET	Cement (21)
	4	Cement, US	CEMUS	Cement (21)
	5	Cementitious Materials, Metric	CMTSMET	Cementitious Material (03)
	6	Cementitious Materials, US	CMTSUS	Cementitious Material (03)
	7	Sand, Metric	SNDMET	Aggregate (Fine) (24)
	8	Sand, US	SNDUS	Other Product (13)
	9	Coarse Aggregates, Metric	CAGGMET	Aggregate (Coarse) (04)
	10	Coarse Aggregates, US	CAGGUS	Aggregate (Coarse) (04)
	11	Water, Metric	WTRMET	Water (05)
	12	Water, US	WTRUS	Water (05)
	13	Air Entraining Agent, Metric	AEAMET	Air Entraining Agent (06)
	14	Air Entraining Agent, US	AEAUS	Air Entraining Agent (06)
	15	Accelerator - Non-Chloride, Metric	ACCNCMET	Accelerator (07)
	16	Accelerator - Non Chloride, US	ACCNCUS	Accelerator (07)

Record 1 of 47

Code List Editor

An editor has been added to COMMANDseries (Files > System Information > Code Lists) so that users may review and even edit code list entries.

Code Lists (ECDLS)



To use the editor, select a database table in the **File** drop-down. All of the codelist fields in the selected table can then be selected from the **Column** drop-down. If no fields are listed, then the selected table currently contains no code list fields.

Once you've selected a field, the system will pair each **Code** with it's associated **Description**. You may edit descriptions, but you cannot change the code values, nor can you add additional codes to the list.

Command Alkon strongly suggests that you use COMMANDseries security to control access to this form.

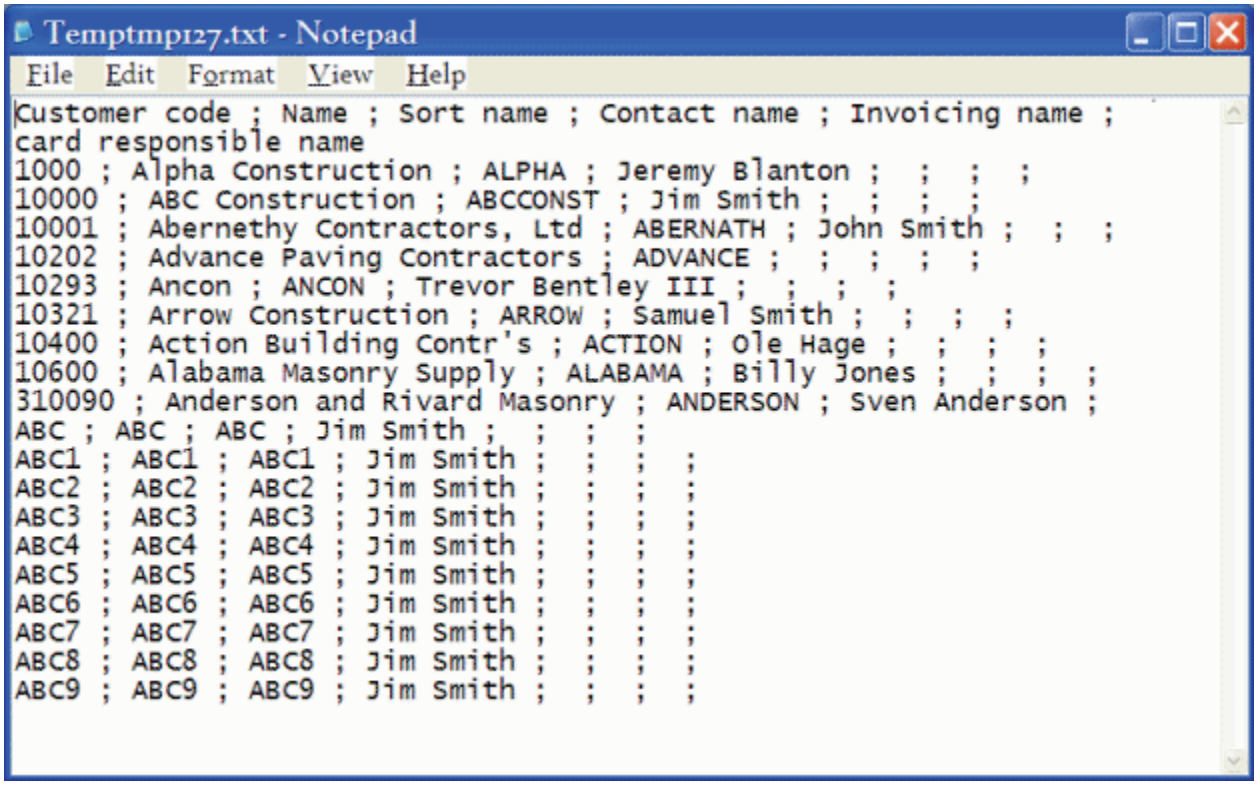
Exporting Lookup Information

The Select screen allows you to create relatively complex searches. If necessary, you can now export the lookup results, either to an Excel spreadsheet or to Notepad, using the buttons at the upper right of the lookup screen.

Exporting Lookups

Both buttons export the current lookup screen, using only the active columns. Notepad exports will be semi-colon delimited:

Export to Notepad

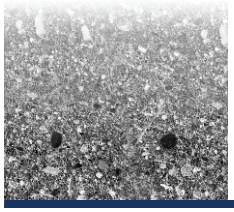

Temptmp127.txt - Notepad
File Edit Format View Help
Customer code ; Name ; Sort name ; Contact name ; Invoicing name ;
card responsible name
1000 ; Alpha Construction ; ALPHA ; Jeremy Blanton ; ; ; ;
10000 ; ABC Construction ; ABCCONST ; Jim Smith ; ; ; ;
10001 ; Abernethy Contractors, Ltd ; ABERNATH ; John Smith ; ; ;
10202 ; Advance Paving Contractors ; ADVANCE ; ; ; ; ;
10293 ; Ancon ; ANCON ; Trevor Bentley III ; ; ; ;
10321 ; Arrow Construction ; ARROW ; Samuel Smith ; ; ; ;
10400 ; Action Building Contr's ; ACTION ; Ole Hage ; ; ; ;
10600 ; Alabama Masonry Supply ; ALABAMA ; Billy Jones ; ; ; ;
310090 ; Anderson and Rivard Masonry ; ANDERSON ; Sven Anderson ;
ABC ; ABC ; ABC ; Jim Smith ; ; ; ;
ABC1 ; ABC1 ; ABC1 ; Jim Smith ; ; ; ;
ABC2 ; ABC2 ; ABC2 ; Jim Smith ; ; ; ;
ABC3 ; ABC3 ; ABC3 ; Jim Smith ; ; ; ;
ABC4 ; ABC4 ; ABC4 ; Jim Smith ; ; ; ;
ABC5 ; ABC5 ; ABC5 ; Jim Smith ; ; ; ;
ABC6 ; ABC6 ; ABC6 ; Jim Smith ; ; ; ;
ABC7 ; ABC7 ; ABC7 ; Jim Smith ; ; ; ;
ABC8 ; ABC8 ; ABC8 ; Jim Smith ; ; ; ;
ABC9 ; ABC9 ; ABC9 ; Jim Smith ; ; ; ;

The Calendar

Use the Calendar feature in COMMANDseries to simplify date entries. You can use it whenever you see the **Calendar** button. The Calendar button will usually be found next to the **Date** field. You can also invoke the calendar by pressing <Enter> when the cursor is in a Date field.

Keystroke	Function
<Tab> / Left Arrow	Advances one day
<Shift+Tab> / Right Arrow	Backs up one day
Up / Down Arrow	Previous Week/Next Week
<PgUp> / <PgDn>	Previous Month/Next Month
<Ctrl+R>	Invokes the Calendar
<F11>	Searching toggle
<F2>	Closes the Calendar
{File > Search}	Searches for a month

You can also press <F6> to execute the **Add Occurrence** command.



Order Entry

Order entry is the foundation of COMMANDconcrete and COMMANDaggregate. Orders are taken and tickets generated while capturing data for invoicing and reporting.

Topics in this section:

Standard Order Entry

Scheduling an Order

Scheduling an FOB Order

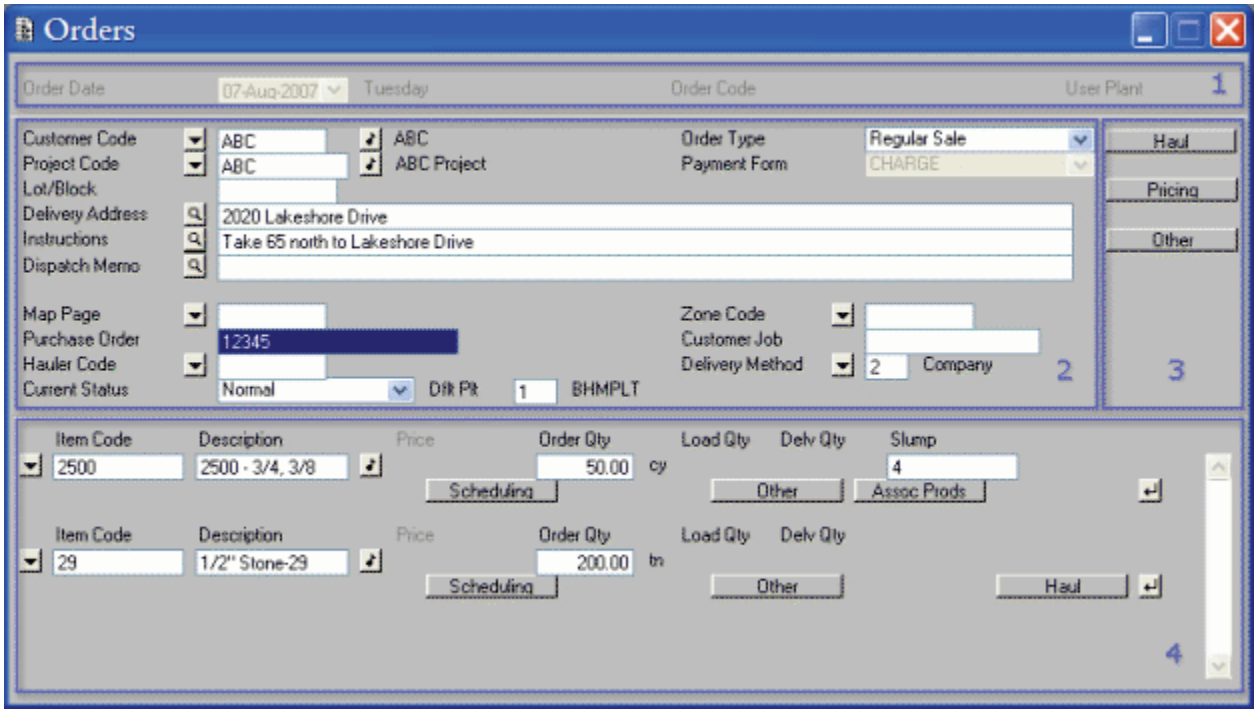
Standing Order Entry

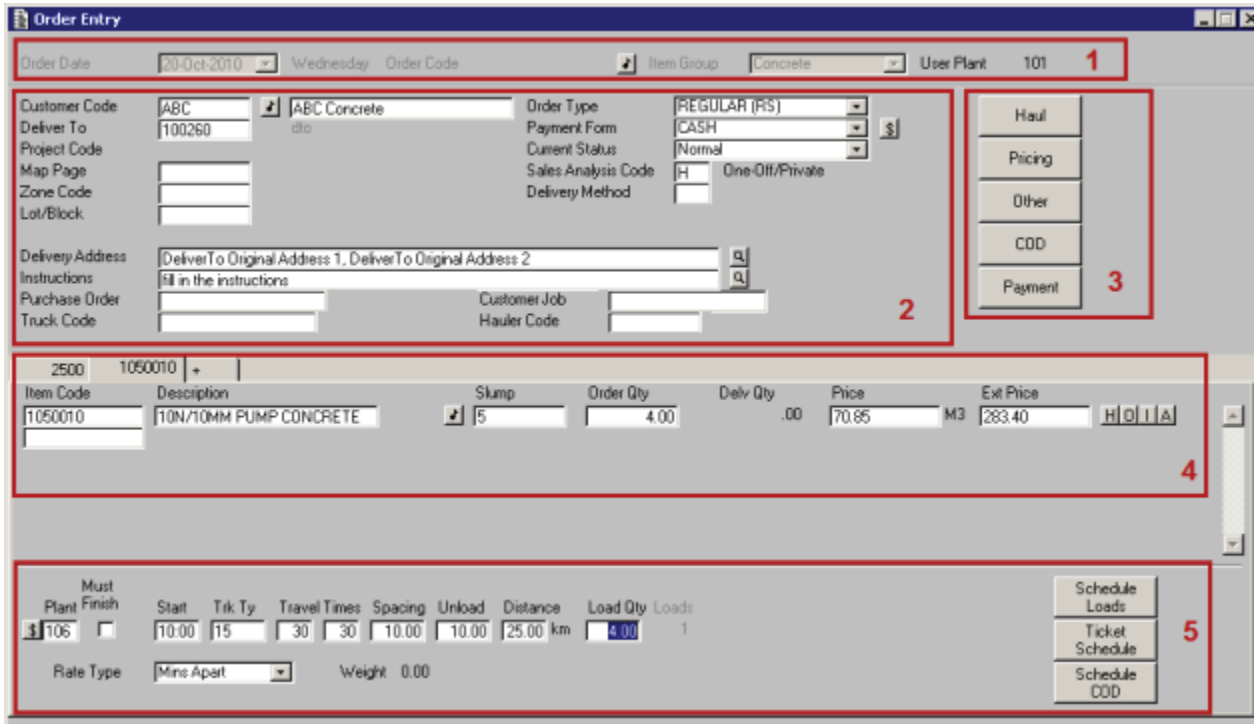
Contract Integration in Order Entry

Order Entry Screen Layout

A lot of information is contained on the **Orders** screen, so it's a good idea to be familiar with the layout.

Order Entry Layout (EDTCORD)





1. **Header** – Together, the **Order Code** and **Order Date** uniquely identify each order in your system. Because these two fields are central to keeping database references intact (generally referred to as "referential integrity"), when you <Tab> out of the Order Code field, these two fields will become inactive.

If you are entering an order and realize that you have entered the wrong date, you will not be able to change it; your only option is to clear the screen (<F4>) and start from the beginning.

The **Item Group** identifies the type of items you will be entering on the order.

2. **Order Information** – This section contains order delivery information.
3. **Order Information Buttons** – Additional order related information is accessible through these buttons. The **Haul**, **Pricing**, and **Other** buttons have a number of fields which generally do not have to be entered manually – the values default from the project or customer record.

   If the current order is a COD order, the **COD** Calculator button will display, giving you access to the total order price.
4. **Order Line Information** – This section has multiple tabs, each tab corresponding to a single primary product on the order. The schedule for the product can be entered on the tab as well, simplifying order entry. The first product on the first schedule tab defines the item group that will be used for that order.

   Each item type is entered on a separate schedule tab. The first product you enter will be considered the main product, with other products treated as extra products.

   Only one item group is allowed per order. For instance, a concrete product (block) and a ready-mix product cannot be on the same order, but two ready-mix products can be on the same order. You will need to create different orders for different item groups, even if they are delivered to the same customer or address. The first product on the order line defines the main product; if different types of products are added afterward, they are considered extra products.
5. **Schedule Price Totals** – This section displays the scheduling information for the current Item tab. From here, you can schedule each load and ticket, and can schedule any COD items on the current tab.

Standard Order Entry

COMMANDseries provides multiple options for order entry. In addition to the standard screen, you can also enter orders through the ticketing and dispatch screens. Standard orders can be entered for any day, and are also known in the industry as **daily orders** or **regular orders**. Use the orders screen to enter daily/regular orders.

Orders do not have to be associated with a project. COMMANDseries accepts stand-alone orders. For example, you might have a one-time FOB order that is not a part of a project.

Related Topics:

Order Haul Information

Order Pricing Information

Entering Other Order Information

Entering Products on an Order

Other Order Line Information

Associated Products

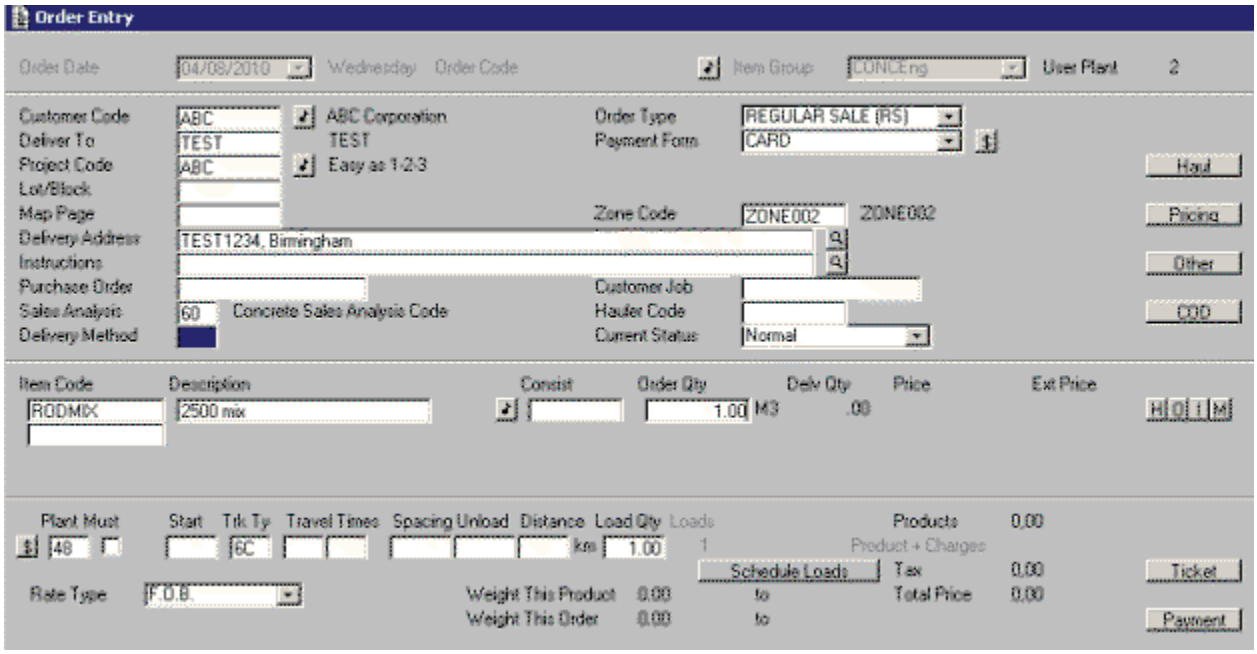
Forecasted Shipped Quantity

To enter an order:

Because of variances in versions, screen fields may be in a slightly different order.

1. Go to the **Orders** screen {Dispatch > Orders}.

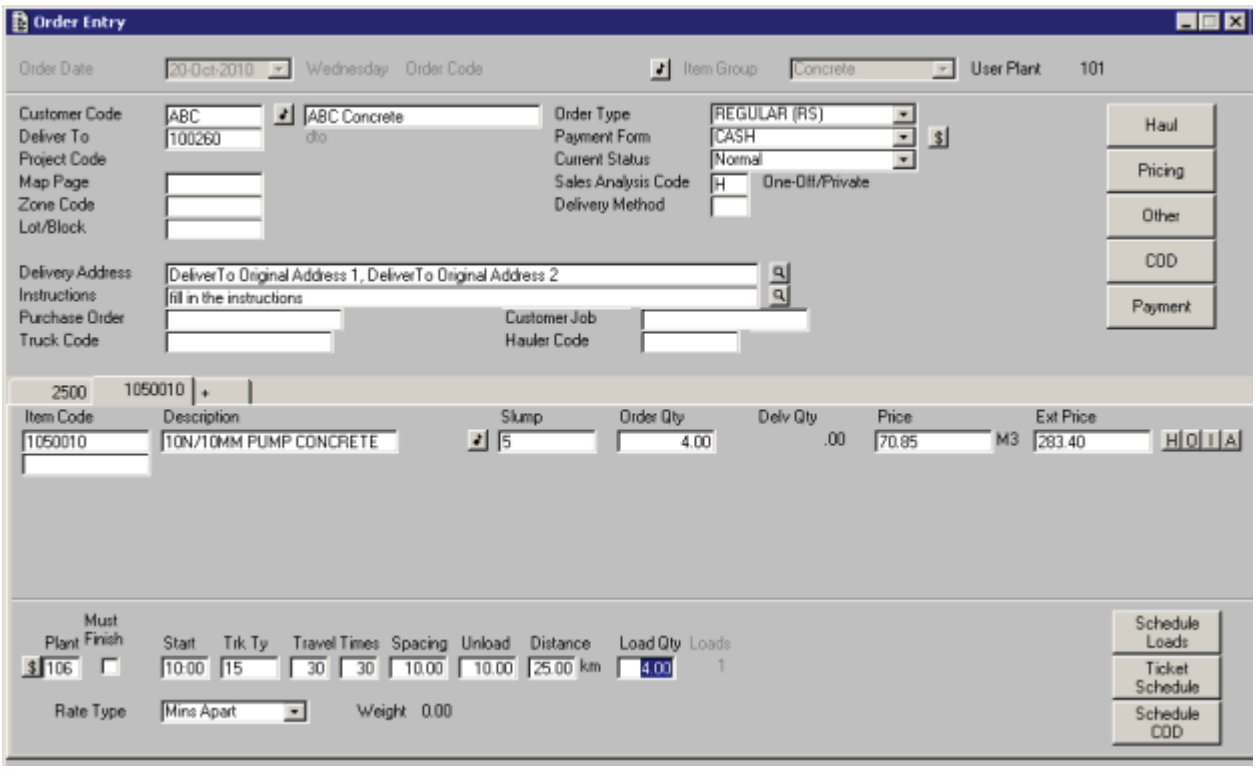
Orders - header (EDTCORD)



2. Enter an **Order Date**. COMMANDseries provides many options for entering an order date.
3. The next field is the **Order Code**. If this is a new order, tab through this field and COMMANDseries assigns the next number available. To look up an existing order, enter the **Order Date** and **Order Code**. Pressing the <Enter> key while in the **Order Code** field will display a list of orders entered for the specified day.

   When you tab out of the **Order Code** field, the top part of the form becomes unavailable; this header information is now locked, to prevent another user from attempting to make an entry using the same order date/order code combination. If either field is incorrect, the entire form must be cleared and entered anew.

   See **Standing Order Entry** for information on entering a standing order.
4. The **Item Group** value will defaults from the current user's **Default Item Group** setting, located on the Users-Preferences tab. Available options depend on the system license.
5. The **User Plant** defaults from the Plant Code specified when the user logged into COMMANDseries.



6. Enter a **Customer Code**
   -or-
   Detail on the field to access the Customer Lookup **Choices** screen.

   The customer code and name automatically transfer to the appropriate fields. The Customer Name can be edited; you may need to change the Name for COD customers.

   After the customer code is entered, the system automatically checks for the existence of customer projects. If any are found, the cursor moves to the **Project Code** field.

   - If the credit code is valid, the system moves the cursor to the **Project Code** field.
   - If the credit code is invalid, the system warns you of the problem and returns the cursor to the **Customer Code** field so you can enter a valid customer.

7. The **Customer Name** defaults from the Customer record. It can be edited if necessary; generally, it is only changed for COD orders.
8. The **Order Type** can default from the project file; **Regular Sale** will be the most frequently used option. Use the drop-down button to select a different option if needed. (See the Order Types section of this manual for additional information regarding order types.)
9. If enabled on the Configuration-Project/Frame Project tab, the **Deliver To** field will display. Enter a **Deliver To** code or Detail on the field to select from a list.

   A Deliver To record contains delivery information to a specific site. The Behavior of this field is determined by the various settings on the Configuration-Project/Frame Project tab

10. If this is a project order, enter a **Project Code**. Press <Enter> to display a list of projects for the selected customer.

    If you select a project, the system verifies the project's credit code. If you do not enter a project, the system will check the customer's credit code. Depending on the results of the verification, the system behaves as follows:

    - If the customer has been cleared for charge orders only, the **Payment Form** field will display **Charge**. The field will be grayed out; you cannot change it.
    - If the customer credit code allows for multiple payment forms, a dialog box will display asking you to select a **Payment Form**—Payment Forms are user defined.

      Select a radio button and accept the dialog box. The selected option will display in the **Payment Form** field. The field will be active: you can press the drop-down button to change the payment option.
    - There is a button to the right of the **Payment Form** field, labeled with a dollar sign (**$**). This button brings up a screen for additional information about the customer's payment. For checks, you can enter bank and check information; for credit cards, enter the last four digits of the card number, the card type, and expiration dates.
    - If you have multiple cash-only payment forms, the **Payment Form** field will activate; press the drop-down button to select from the list.
    - A dialog box may appear with some sort of warning message: **`Contact Credit Dept. before taking an order for this customer.`** Press **OK** to continue. The **Payment Form** field will then display whatever method has been approved for the customer. You may be prompted to select a payment form.
    - If the Customer has been assigned a **No Sale** credit code, a dialog box reading **`No Sale`** will appear. Once you select **OK**, the order form will clear. You cannot take an order for a customer with a **No Sale** credit code.

    If you do not select a project, the system verifies the customer's credit code and then performs one of the steps below, as necessary. To continue with the order, you will need to enter a Delivery Address (required field). You may also enter a **Purchase Order**, **Job Number**, **Map Page**, **Zone Code**, and **Additional Instructions** as necessary. If the selected customer has no projects, the field will not be available.

    If you have purchased COMMANDcredit, a credit checking module, additional credit management features are available. Please refer to *Appendix B: Credit Checking* for additional information.

11. Enter the **Lot/Block**. This field identifies lot/block information for a project order. This feature is a key component of COMMANDlien, and is required if COMMANDlien is licensed. See the *COMMANDlien User Guide* for more information.

12. The **Map Page** field identifies the map page on which the job site is located. Unlike the **Zone Code**, which is associated with the map page, the map page represents the distance from a given plant to a specific location, identified by its location on a map page in your company's map book. If map pages have been entered, COMMANDseries dynamically inserts travel times based on travel times entered for the time period when the delivery is made. The **Show Map Page in Orders/Tickets** checkbox on the **Dispatch** tab of the **Configuration** screen must be marked for this field to be available.

If you change the **Map Page** that defaulted from the project, COMMANDseries automatically changes the **Travel Time** to correspond with the corrected map page.

13. The **Delivery Address**, **Instructions**, **Zone Code**, **Purchase Order**, and **Customer Job** default from the project file. Edit this information as desired.

    If you do not select a project, enter a **Delivery Address** (required field).

14. Enter a **Lot/Block** code.
15. The **Delivery Address** is the address of the job site where products are scheduled for delivery. This may include city, state, and code. Although there is no practical limit to the length of the address that can be keyed into the system, the physical printing space available on the order form and ticket form must be considered. This field is required.

    Detailing on the **Delivery Address** field opens a text box. If you are interfaced to Microsoft MapPoint, refer to the *Microsoft MapPoint User Guide*.

16. The **Instructions** field contains order-specific instructions that can be printed on the order's tickets. The text box allows for lengthy instructions; however, practically you are limited to the available space on the ticket. These layouts are defined in the Document Formats editor {Files > General Information > Document Formats}.
17. The **Zone Code** may be required to establish cartage rates, zone charges, or tax authority. The **Zone Code** value can default from a project or from a map page. Press <Enter> or detail on the field to display a list of zones entered in the system.
18. The customer's **Purchase Order** number is optional by default; to make it required, go to either the **Customer** or **Project** screen and select the **Accounting** tab. Check the **Purchase Order** box in the **Required in Order Entry** section. If this field is required, the entire field will be shaded.
19. Enter the **Delivery Method**. Select a delivery method from the available list. The Delivery Methods field identifies the order as Delivery F.O.B. Various levels of detail can be set up for Delivery and F.O.B. delivery methods {Files > Plant & Delivery Information > Delivery Methods}.
20. Enter the **Current Status**. This is the current status of the order. Choose from
    - **Normal**
    - **Will Call**
    - **Weather Permitting**
    - **Hold Delivery**
    - **Completed –** An order with a status of **Completed** will not display on the Tracking and Scheduling screens, regardless of whether or not the order has actually been completed.
    - **Review** – Any order entered or edited by a customer user (a COMMANDseries user assigned to a customer for order entry) will automatically be assigned to this status.

    Once an order has been ticketed, **Will Call** and **Weather Permitting** are not available.

Order Haul Information

Order haul charges are initially established by the customer and/or project files. Most of the time, there is no need to modify these settings during order entry. In some cases, however,

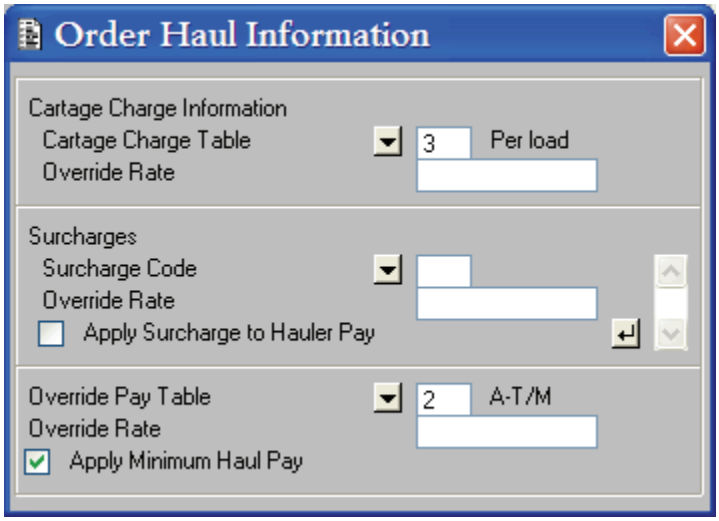
you may want to modify or review the haul charges for an order. The settings on this screen serve as defaults for order line (item-level) haul information.

The haul charge settings are accessible through the **Haul** button on the order screen.

To modify order-level haul charges:

1. On the **Order Entry**screen, enter a customer code and, if necessary, a project code. The **Haul** button will not display until a valid customer code has been entered.
2. Select the **Haul** button. The **Order Haul Information** screen displays.

Order Haul Information (EDTORDR1)



The existing information has defaulted from the customer or project files. Any changes made to this screen will not affect those files, but will instead affect only this order.

3. Enter a **Cartage Charge Table**, or detail on the field to select from a list.
4. Charge tables have a default rate (or rates). If you want to change that rate for this order, enter an **Override Rate** for the cartage charge.
5. Enter a **Surcharge Code**, or detail on the field to select from a list.
6. If necessary, enter an **Override Rate** for the surcharge.
7. If necessary, select **Apply Surcharge to Hauler Pay**.
8. If necessary, select **Add Occurrence** to add another surcharge.
9. Enter an **Override Pay Table**, or detail on the field to select from a list.
10. If necessary, enter an **Override Rate** for the pay table.
11. If necessary, select **Apply Minimum Haul Pay**.
12. **Accept** the screen to save the settings and return to the **Orders** screen.

Order Pricing Information

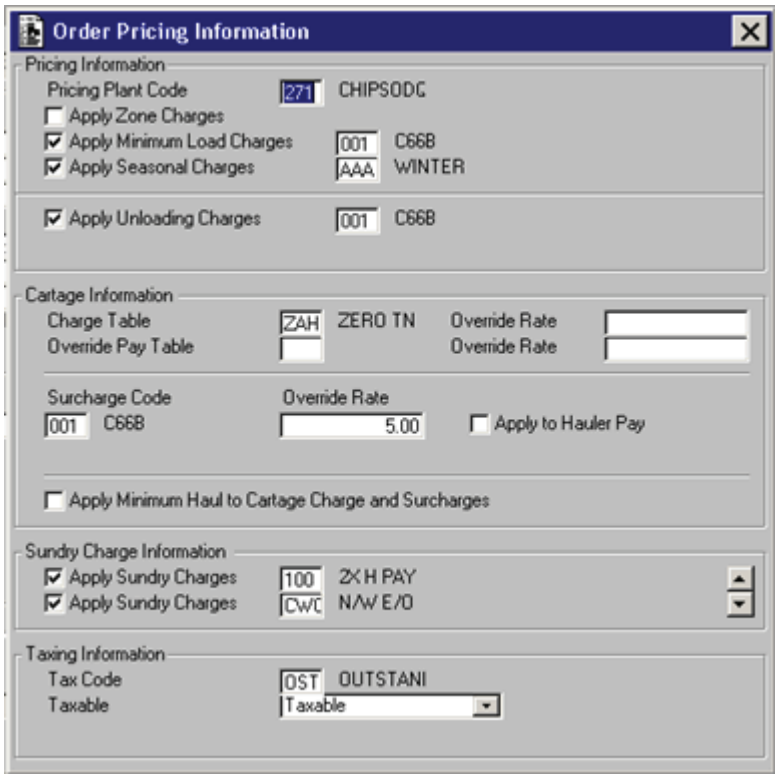
The **Order Pricing Information** screen {Dispatch > Orders > Pricing} lets users set various pricing and taxing related information. This information defaults from either the customer or project **Pricing Information** screen. While order takers sometimes open this screen for reference, changes are seldom needed.

Access to this screen can be controlled through user privileges.

To enter order pricing information:

1. Open the **Order Pricing Information** screen by pressing the **Pricing** button on the Order Entry screen {Dispatch > Orders > Pricing}.

Order Pricing Information (EDTCORD2)



2. Change the **Pricing Plant Code** if necessary. This field identifies which plant these products are priced from for this specific order. This code is found in the Plant Code field in the Plants file {Files > Plant & Delivery Information > Plants}.

   The pricing plant can default from the scheduled delivery plant by selecting **Default Pricing Plant** from **Scheduled Plant** in the configuration of COMMANDseries {File > General Information > Configuration > Dispatch}.

   If you choose to apply Minimum Load, Seasonal, or Unloading Charges, you must also specify what charge table to use. When the boxes are checked, a field will display to the right of the label. Detail on the field to select from a list.
3. Select **Apply Zone Charges** if necessary. Zone charges are calculated based on the **Zone Code** field. This option is rarely used in the aggregate industry. Check with your CA customer service representative for further information.
4. To **Apply Seasonal Charges**, select that checkbox. The seasonal charges are calculated based on the **Seasonal Charge Table** field. Select the seasonal charge table using the detail button.
5. To **Apply Unloading Charges**, select that checkbox. Unloading charges will be calculated based on the **Unloading Charge Table** field. Select the unloading charge table using the detail button.

6. Enter a **Cartage Charge Table**, or detail on the field to select from a list.
7. Charge tables have a default rate (or rates). If you want to change that rate for this order, enter an **Override Rate** for the cartage charge.
8. Enter an **Override Pay Table**, or detail on the field to select from a list.
9. If necessary, enter an **Override Rate** for the pay table.
10. Enter a **Surcharge Code**, or detail on the field to select from a list.
11. If necessary, enter an **Override Rate** for the surcharge.
12. If necessary, select **Apply Surcharge to Hauler Pay**.
13. If necessary, select **Add Occurrence** to add another surcharge.
14. To **Apply Sundry Charges** to an order, select that checkbox. Sundry Charges are extra charges added to an order, such as after-hours delivery, a weekend delivery, environmental charges or a minimum ticket charge. Sundry Charges provide you with a way to charge customers for purchases that exceed normal circumstances.

    You can assign sundry charges at the project, customer, and order level.
15. Enter the **Tax Code** for the plant/order. This field identifies the tax code representing the location where the load ownership changes. This code will be the taxation point for the order and all of its tickets. Origination-based taxation, destination-based taxation, all taxable and non-taxable sales, and the tax amount itself, are related to the tax authority/locations assigned to this tax code. The Order Tax Code can default from several different locations: Customer, Project, or Zone.

    Because some orders have more than a single taxation point, you can adjust both the **Plant Tax Code** and the **Order Tax Code** separately, if necessary. Once the order ships, however, only the **Plant Tax Code** may be modified.
16. In the **Taxable** field, choose whether the order is **Taxable** or **Non-Taxable**.

    If the order is non-taxable, the **Non-Taxable Reason Code** field will display. This field identifies the reason the order is non-taxable. Enter a code or detail on the field to select from a list.

    The system will not save a non-taxable order unless a reason code is specified.

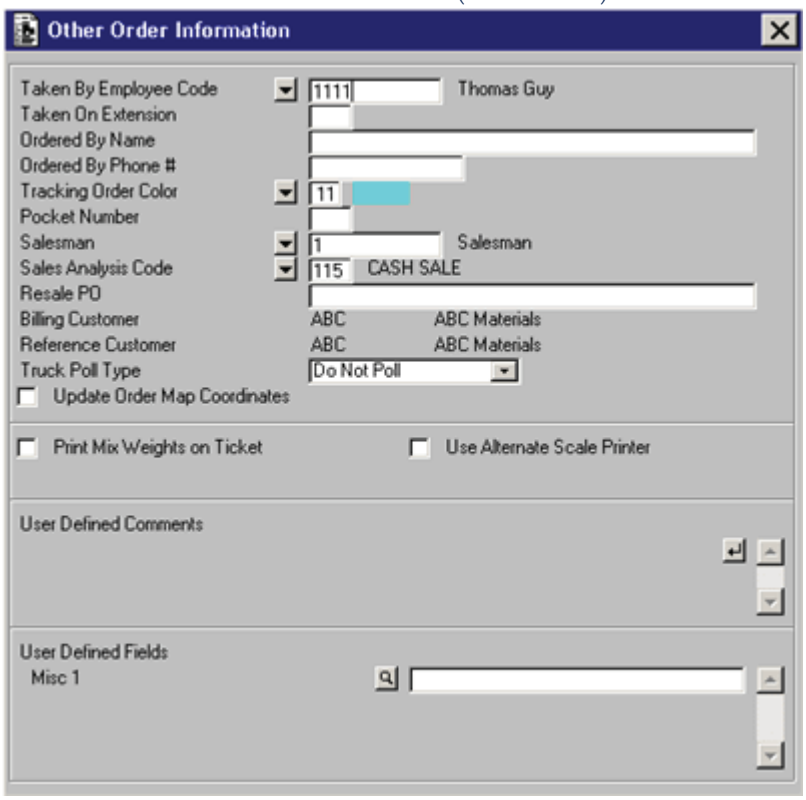
    If an order is set to be non-taxable, each order line on the Order Report shows as non-taxable, regardless of how the item is set up.
17. Accept the Order Pricing Information screen.

Entering Other Order Information

The **Other Order Information** screen {Dispatch > Orders > Other} contains additional fields related to the order. Any of these fields can be printed on the order and/or ticket by including the fields in the appropriate document format. **Salesman** and **Tracking Order Color** are required to accept the order.

All of this information generally defaults during order entry. You will not have to change values on this screen very often.

Other Order Information (EDTORDR3)



To enter other order information:

1. The employee code of the person entering the order into the system defaults into the **Taken By Employee Code** field, but only if the COMMANDseries user code is linked to the employee's code.
2. The **Taken on Extension** field lets you record the extension number on which the order was taken. Some phone systems record all calls based on extension. Entering the extension on this screen makes it easier to retrieve the stored call.
3. The **Ordered by Name/Ordered by Phone** fields are used to store site-specific information relating to the order.
4. **Tracking Order Color** determines the color used to display the order on the Tracking and Scheduling screen.

   If the scheduling plant is changed after the order is accepted, the **Tracking Order Color** defaults to the color specified by the order, not the plant.
5. **Pocket Number** lets you store the filing pocket where the hard-copy order form was placed.
6. Enter the **Salesman** who generally works with this customer.
7. Enter a **Sales Analysis Code**. This field is used by COMMANDexecutive to generate Sales Reports.
8. Enter the **Resale PO** number where necessary. This is an optional field used to store the resale purchase order number of goods. This is an optional field which can be used to display in the details section of Ticket Data Out.

9. It is possible to set up a number of different customers that play different parts in the system. For example, you may have one customer making the order (reference customer) on behalf of another customer. The customer that will pay for it (billing customer) may also be different. It may then be shipped to one of those or another customer (shipping customer). In order to use this functionality the **Use Multiple Customer Codes** checkbox must be checked on the **Main** tab of the Configuration screen {Files > General Information > Configuration}. Individual Shipping Customer and Reference Customer details can then be defined on the **Main** tab of the Projects screen {Files > Customer & Project Information > Projects}.

   In the Projects file, the billing customer is the owner of the project. The **Billing Customer** defaults to display the customer code and name for the customer that will be billed for the current order. This field is greyed-out and read only.

10. The **Reference Customer** defaults to display the customer code and name for the reference customer that is defined in the Projects file. This will typically be the same as the billing customer, but there may be cases where it differs.
11. If your system is enabled for GPS tracking, the **Truck Poll Type** field displays. Polling refers to the GPS base system polling, or requesting, GPS coordinates when a truck enters On Job status. The options for this field are:
    - **Do Not Poll**
    - **Poll First Truck** – Poll the first truck on an order to arrive at a specific site
    - **Poll Every Truck**

    If you are polling, select the **Update Order Map Coordinates** field to have the newly polled coordinates written back to the order. This option is useful if an order is to be delivered to multiple locations.
12. To **Print Mix Weights on Ticket**, mark that checkbox.
13. Select **Use Alternate Scale Printer** to state that the ticket should be printed from an alternative scale printer, rather than the principle one. This might be used for a number of business reasons, but is commonly used when the business wishes to print the ticket on different paper.
14. The **User Defined Comments Code** field lets you select messages to be printed on an order and/or ticket. Detailing on the field will display a list of messages containing an **ALL** type, available for use with Orders and Tickets.
15. The **User Defined Fields** area allows users to append additional information on orders, payments, customer files, etc. To add a comment, click in the appropriate field and type in the comment. In some cases, comments will already be there.

    For additional information about these features, see the *Message Text* and *Configuration* sections in the *Setting Up the System* manual.
16. **Accept** this screen to save your changes, if any.

Entering Products on an Order

Information entered up to this point has determined who is purchasing the material, where it will be shipped, and how the customer will be charged. Now it's time to get to the heart of the matter and specify exactly what item the customer is purchasing.

Obviously, every order requires at least one product. However, some orders require multiple products, and some mixes have additional products—admixtures—associated with them.

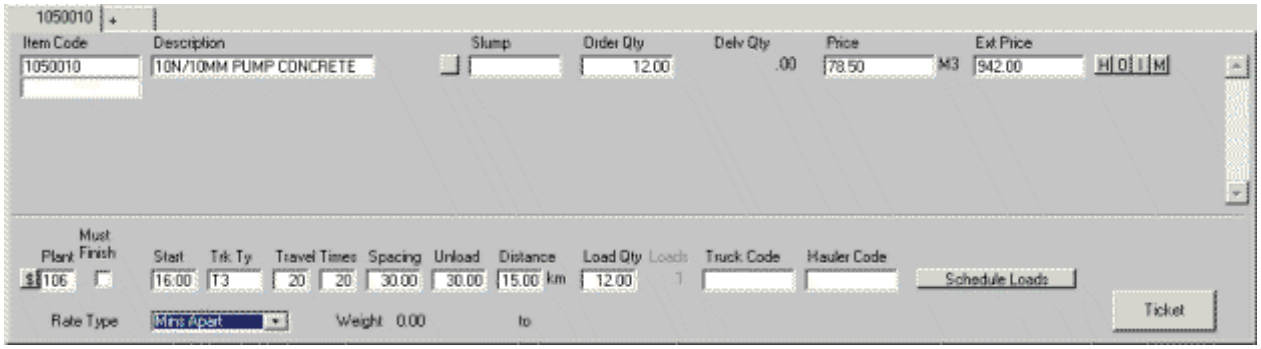
If you have products that are associated with the mix (primary product), removing or changing the mix product will remove all associated products from the order. The extra products will remain with the order.

Each primary product, along with its delivery schedule, is entered on a separate tab.

To add products to an order:

1. Enter the **Item Code**, or detail on the field to select from a list.

Product Order details (EDTCORDTAB)



2. The first product on the first schedule tab defines the item group that will be used for that order.

   Each item type will be entered on a separate schedule tab (up to a maximum of ten). The first product you enter will be considered the main product, with other products treated as extra products.

   Only one item group is allowed per order. For instance, a concrete product (block) and a ready-mix product cannot be on the same order, but two ready-mix products can be on the same order. You will need to create different orders for different item groups, even if they are delivered to the same customer or address. The first product on the order line defines the main product; if different types of products are added afterward, they are considered extra products.

   Each Schedule is entered on a new tab. You cannot create a second schedule until you have filled out the current one. Create a new tab via one of the following methods:

   - Click on the **+** tab icon.
   - Press **F6** while the cursor is in the schedule line.
   - Right-click with your mouse on the order and select **Add Schedule**.

   Remove a schedule tab via one of the following methods:

   - Press **F5** while the cursor is in the schedule line to clear the schedule line, then press **F5** again to remove it.
   - Right-click with your mouse and select **Remove Schedule**.

   Regarding Economic Sourcing, when a product is entered on the Order Entry screen, the product with the best cost for available plants will be assigned to the scheduling

plant. When an extra product is entered that is not available for that plant, the system will find an available alternative product if possible.

3. You can enter an unlimited number of products on a single order. Either detail on the field or double-click inside the field to see a list of available products. Once the list displays, double-click the appropriate item to select it.

   The options displayed in the lookup list depend on the source of the list (Project or Item).

   The radio buttons at the bottom of the list control the display of available items.

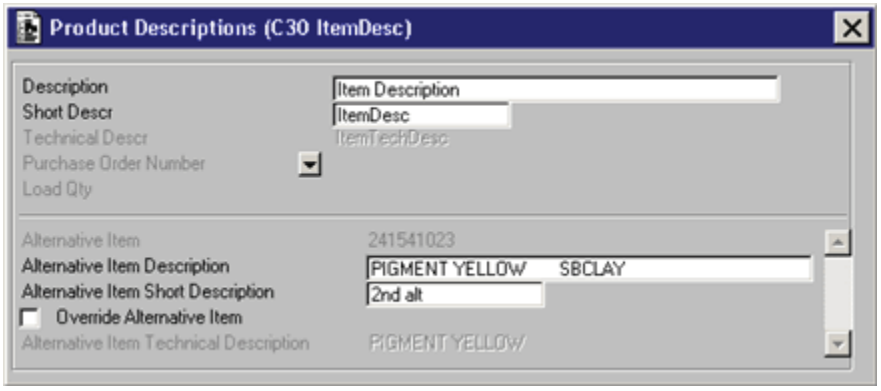
   - **From Item** - Displays all saleable items in the system.

4. **Accept** the screen to return to the order lines.
5. The **Description** is taken from the **Short description** field on the **Possible Items** screen, displayed above. Detail on this field to display the **Product Descriptions** screen. With this screen, both the long description and the short description can be accessed and modified. Changes made on this screen affect only the current order. If the same item is subsequently added to a different order, this information will default from the Item Master file (IMST).

   - If the item is a constituent or mix, the **Batch Code** can be viewed or edited.

   Accept this screen to return to the **Order Entry** screen.

Product Descriptions (EDTSHIP5)



6. Enter the **Order Quantity**. This is the total ordered quantity of the item specified in the Item Code field. The customer can change the **Order Quantity** the day it is being delivered.

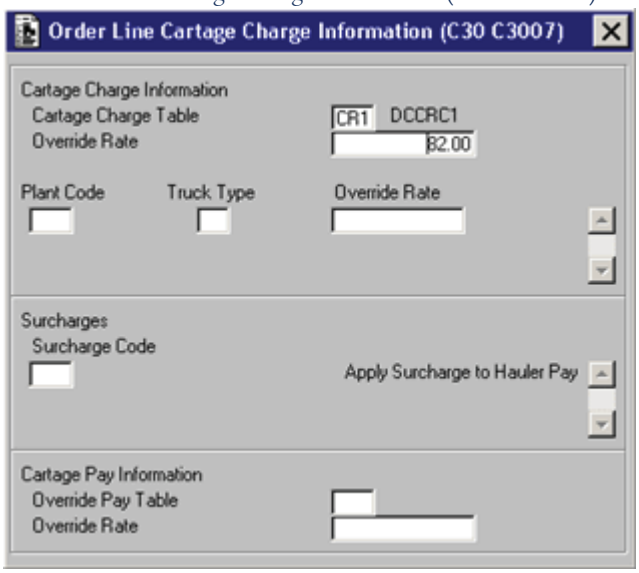
   If the customer decreases the ordered quantity, or stops delivery before the ordered quantity is reached, it is advisable to keep this field at the original quantity ordered. This strategy lets you analyze whether this customer over-orders on a regular basis. Instead of decreasing the ordered quantity, change the Order Status field to **Completed**. This strategy will cause any undelivered loads to be removed from the Truck Tracking function screen.

7. **Delv Quantity** is the current total ticketed quantity of the product specified in the **Item Code** field—using the same unit of measure as the **Order Quantity** field. **Delivered Quantity** cannot be edited through the Order Entry screen.
8. The **Price** is a default value associated with the item code, the project, or the customer. The field is grayed out and cannot be edited unless the **Allow Price Change in O/E**

checkbox on the **Pricing** tab of the **Projects** screen {Files > Customer & Project Information > Projects} is checked.

9. The **Ext Price** field displays the total price, i.e., the order quantity multiplied by the price of the order item. This field can also be edited.
10. The **Slump** value defaults from the item file, although it may be edited at this time.
11. Pressing the **H** button opens the **Order Line Cartage Charge Information** screen. This lets you add cartage charge information for this particular item on the current order.

Order Line Cartage Charge Information (EDTORDR7)



12. Pressing the **O** button opens the **Other Order Line Information** screen. See Other Order Line Information for more details.
13. Pressing the **I** button opens the **Item Inquiry** screen. This screen lets you view the inventory for a particular plant with regard to the current item. Inventory must be in your system license in order to view this screen.

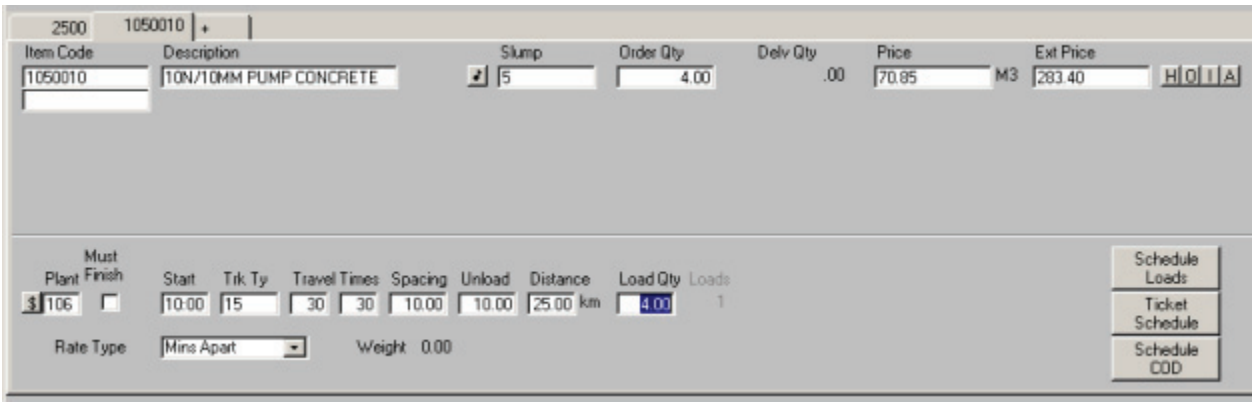
Item Inquiry Screen (EDTLCIN7)

14. Pressing the **A** button opens the **Order Line Associated Products** screen. See Associated Products for more details. With the appropriate settings, this may be an M button. See "Order-Level Mix Design" on page 87 for more information.
15. If the item that has been ordered is a project product, the **C** button displays. This button opens the **Calculation Project** screen.

Entering Schedule Information

Schedule information can be entered on each product tab.

EDTCORDTAB - Schedule detail



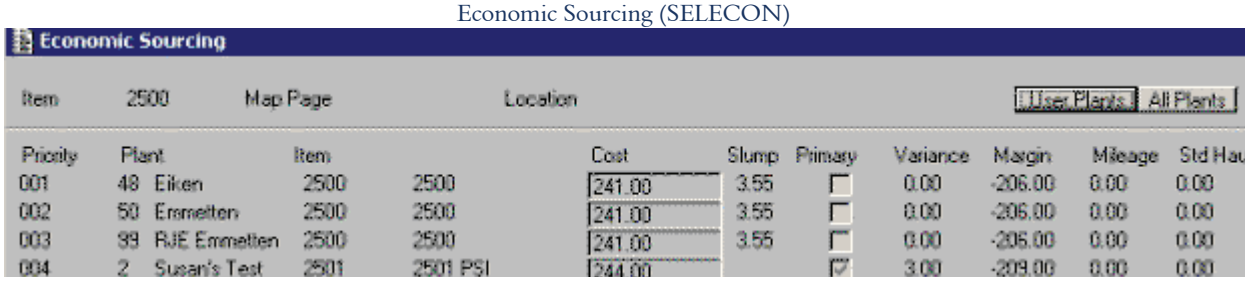
1. If the order is part of a project, the **Plant** code defaults from the Project record.

   If the order is not part of a project, specify the plant code for the plant from which you plan to ship the scheduled order when it is ticketed.

   The **Plant** field defaults to the most economical plant choice for delivering this order. This can be altered on the Economic Sourcing screen.

   To help you choose a plant, select the **$** button. The Economic Sourcing screen displays, listing the costs for each plant and the difference in costs between them and the least expensive plant. This screen calculates material cost and delivery cost for each plant for one unit of material (concrete or aggregate), and lists those plants in ascending order by total cost.

Economic Sourcing (SELECON)



   The dispatcher can determine which is the best plant to schedule an order from to receive the most profit.

2. The **Must Finish** checkbox states whether or not an order must finish. Concrete orders default to a state of Must Finish when the mix is designed with TQS, regardless of whether the box is checked or not. For any other mix, this check box must be selected in order to state that the order must finish.

3. Enter the **Start Time**--the time the customer wants the first load to arrive. This value will be used as the basis for all scheduling calculations. To speed order entry, you can just enter the hour—for example, **9**—and tab through. The system will automatically convert the **9** to **9:00**.

   COMMANDseries defaults to military time. To override this default, for example, if you need to enter 3:00 pm, enter **3p** and press <Tab>.

4. Select a **Truck Type**. This field can default from the Project file. The field can be left blank if a specific truck type is not required.

5. The **Travel Time** fields default from the Project, the Deliver To, or from specific map pages. The values indicate travel time from the plant to the site and back. You can modify these times as needed, for things such as weather or traffic.

   The value entered in the **Time To Job** field is automatically duplicated in the **Time To Plant** field; however, the values can be changed. If the values are changed from the default, the fields will become shaded to indicate that they have been altered.

   If the order is a non-project order, enter an estimated travel time for the drive from the specified plant to the job site, and then back.

   Good service and delivery efficiency are based upon sending trucks at the rate the customer can unload them. There are exceptions, but generally there is no need to send trucks at a 15-minute spacing when the unloading time is 30 minutes.

   Exceptions:

   - The customer wants the first few trucks sent close together but will take longer to unload such as for a footing or foundation wall.
   - The customer demands trucks at a high rate but cannot sustain that rate.
   - The order is being supplied simultaneously from two or more plants. The delivery rate from each plant will be twice (or three times) longer than the rate ordered, as trucks will be scheduled to arrive alternately from each plant.
   - The customer is unloading in several places simultaneously. Here the unload rate will be twice the delivery rate.

   These time values are used to calculate scheduling information used in dynamic scheduling and truck tracking. While dispatchers and order takers frequently have to estimate travel time, it is important that those estimates be as accurate as possible. One underestimated schedule can disrupt the entire day's deliveries.
6. Enter a **Truck Spacing** time in minutes. The **Unload Time** value will default to this time, but it is irrelevant. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
7. The **Unload Time** value will be calculated based on the entered Spacing.
8. The **Load Quantity** values will default from the Truck Type, and can be edited if necessary. Once a value has been entered, the number of **Loads** requried to complete the schedule will be displayed.
9. The system will use the information entered thus far to generate a delivery schedule. Before it can complete the calculations, however, it has to know what to use as the primary means of measurement. The options for the delivery **Rate Type** are:

   FOB (Freight on Board)

   - Enter a **Truck Spacing** time in minutes. The **Unload Time** value will default to this time, but it is irrelevant. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
   - The **Trucks Required** field will be cleared of data.
   - The material will be picked up by someone else's truck. Accordingly, the system won't worry about truck availability.

   For delivered orders, something must be entered in either the **Truck Spacing** or **Trucks Required** fields. If both fields are left blank, the system will consider the order as an F.O.B. order, and the order will not appear on the regular Tracking & Scheduling

screen! If only one truck is required, skip the truck spacing and populate the **Trucks Required** field with **1**.

Caution: FOB orders are not displayed on the normal Truck Tracking screen but have a separate screen of their own (Tracking will display FOB orders on the main screen; please consult Tracking documentation for configuration details); consequently, orders that are inadvertently entered as FOB may not get delivered! Please refer to the Tracking and Scheduling section of this manual for additional information concerning FOB orders.

Minutes Apart

- Minutes between trucks' arrival on site -- Enter a **Truck Spacing** in minutes. The **Unload Time** value will default to this time, but can be edited. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
- In all scheduling calculations (or recalculations), the system will make changes in order to maintain the specified Truck Spacing interval, regardless of other factors.

Quantity per Hour

- Tab through the **Truck Spacing** and **Unload Time** fields and enter a quantity per hour in the **Delivery Rate per Hour** field. The **Trucks Required** field will be calculated but disabled; the **Truck Spacing** and **Time** fields will also be disabled.
- Particularly with large pours, the contractor is more interested in making sure that the mix is arriving at a steady rate. This rate keys primarily on individual load sizes.

Quantity per Hour - Unload (Optimization only)

This option is similar to the existing quantity per hour option, but this option will not be affected by the actual pouring rate at the job site. It is intended for use by concrete suppliers who have promised a delivery rate that is independent of the unload rate.

Trucks Required

- Enter a **Truck Spacing** in minutes. The **Unload Time** value will default to this time. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
- The **Trucks Required** field will activate (no longer be gray) and allow change. Enter the number of trucks that you wish to use for this schedule.
- This option can be useful when working orders into the schedule later in the day, when most of your fleet is already committed to other orders.

Round Trip

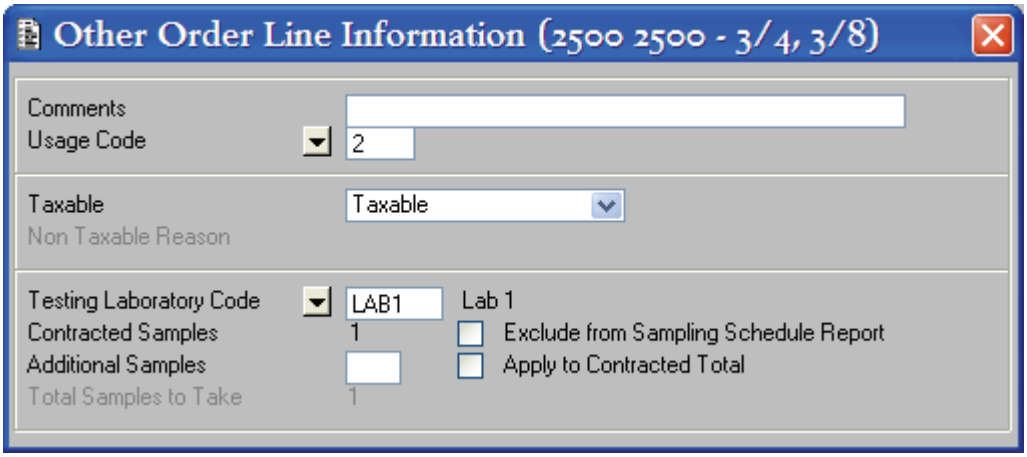
- Enter a **Truck Spacing** in minutes. The **Unload Time** value will default to this time. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out. Tab to the **Rate Type** field and change it to **Round Trip**.
- The **Trucks Required** field will activate (no longer be gray) and allow changes to be made. Enter the number of trucks that you wish to use for this schedule.
- Select the **Loads** button and enter the truck numbers you wish to recycle on this job or use the **Options** menu to enter this data.
- The system will base the schedule on the premise of one truck round–tripping on the order until it has been completely delivered.

10. If you are going to ticket the order fron this screen, enter a Truck Code, or detail on the field to select from a list.
11. If the truck has an assigned Hauler, it will default.
12. For additional scheduling options, press the **Schedule Loads** button. The button opens the Order Line Schedule Information screen, which provides more advanced scheduling options (see Scheduling an Order).
13. To enter an additional primary product on the order, press the **+** tab.
14. Once you have finished entering order and schedule information, you have three options:
    - To ticket the order directly, press the **Ticketing** button. Depending on the system and customer configuration, the system may open the Cash Payments form (please see Cash Management–Order Entry for additional information); once payment has been entered and accepted, the Concrete Ticketing and Shipping screen will open.
    - If you need to take a payment but do not need to ticket the order, press the **Payment** button. When the payment is accepted, you will return to the Order Entry screen.
    - If you simply want to save the order, accespt the screen.

Other Order Line Information

The **Other Order Line Information** screen displays basic information related only to the item (not the entire order). It is accessed by pressing the **Other** button on the order line containing the item. Editing the usage code and tax status is allowed in this screen.

Other Order Line Information (EDTORDR5)



If your system is configured for concrete Sample Scheduling, additional fields will be at the bottom of the form:

Testing Labratory Code – The lab to be used for this sample will default from the project of the system default. You can use the drop-down to select from a list.

Contracted Samples – The required number of samples to be taken from this order, based on the configuration options.

Exclude from Sampling Scheduling Report – If the flag is checked, then the Contracted Samples will not be reflected on the Sampling Schedule Report.

Additional Samples – Allows entry of number of additional samples requested by the customer.

Apply to Contracted Total – If the flag is checked, then the customer additional samples will be counted toward the total number of contracted samples during calculations of the number of samples already taken for a project/product.

Total Samples to Take – Sum of the above sample values.

Associated Products

Admixtures fall into two general groups, **Modifiers** and **Must Contains**:

- **Must Contains** - These are the components that must be in the mix or the mix will not perform as designed. When a mix is designed, the Must Contains components are entered in the mix design.
- **Modifiers** - These are components that do not generally affect the basic mix, but that can be added to make the mix behave differently while retaining its core functionality. May include retarders, accelerators, color, and fiber mesh.

In entering an accelerator to an order, you can't just add it to the order as you would with a pair of gloves or a stack of expansion joints; the system needs to know that the accelerator is to be added to the specific mix. COMMANDconcrete connects the admixture to the appropriate mix through what are called Associated Products. Associated products, primarily admixtures, are products that are linked – associated – with a specific mix on a specific order. The mix file itself is not permanently changed.

This functionality has obvious advantages; however, users should be cautioned that when the ordered product is changed, deleted, or replaced, the associated products are changed, deleted, or replaced along with the ordered product. Such cases are particularly crucial when admixtures such as accelerators or retarders are included as associated products.

Extra Products vs. Associated Products

COMMANDseries uses a pair of terms to distinguish different types of non-mix items:

- **Associated Products** are items—generally admixtures—that are added directly into the mix. Other types of items, such as color or fiber, can also be considered associated products. They are added to an order through the **Associated Product** button for a specific ordered mix.
- **Extra Products** are any other items, such as gloves, expansion joints, or rebar, that are included on an order, but do not go into the mix. Extra Products are added to an order on the main order screen, just like a mix.

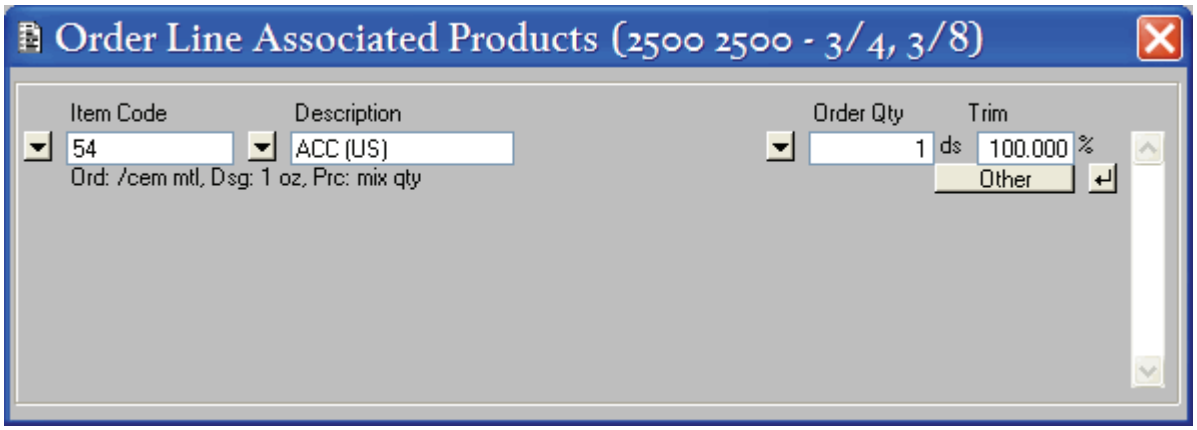
Some items, most notably additives like fiber or color (if added manually), can be classified as either extra products or associated products. In such cases, the key is consistency--it is best to establish company guidelines to ensure accurate reports.

To add a product using the Associated Products button:

1. Select the **Associated Products** button from the Order Line. The **Order Line Associated Products** screen displays. On the title bar of the screen, you can see, in parentheses, the Item Code and Description of the mix with which the items displayed will be associated.

   If Order-level Mix Design is enabled, the Associated Products button on the main Orders screen becomes the **Mix Design** button.

Order Line Associated Products (EDTORDR6)



2. Select the **Item Code** representing the product you wish to associate. The **Description** and **Price** default from the product file, may be edited.
3. Enter the **Order Quantity** for the associated product. Detailing allows changing the products unit of measure.
4. Enter a **Trim Percentage** if necessary.
5. Select the **Other** button if you would like to alter any of the product information for the associated product.
6. If you would like to associate more than one product with the ordered product, use the **Insert Occurrence** button and repeat Steps 2 - 4. When you have associated all necessary products, **accept** the **Order Line Associated Products** screen to save these products in association with the ordered product. When you return to the primary order screen, the **Associated products** (**A**) button will be illuminated, indicating the presence of at least one associated product for the mix.

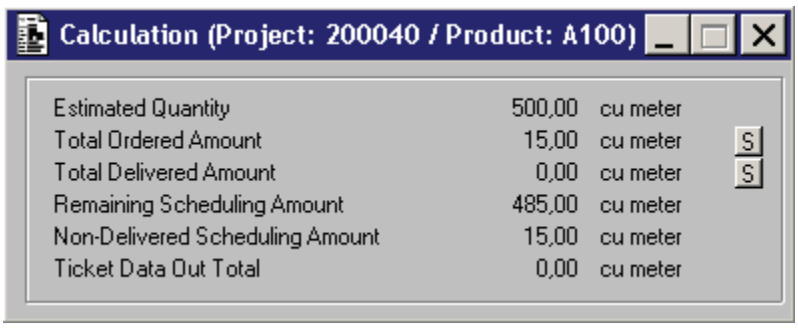
Forecasted Shipped Quantity

When setting up projects, estimates for the quantity of each project product required to complete the project can be entered for quoting purposes. The forecasted shipped quantity is a calculation performed to show the user how much of that estimated quantity has already been ordered and shipped and how much is remaining, in order to give an indication of project progress.

In order to access this information, users can either click on the **C** button in **Order Entry** , or the **Calculations** button on the **Edit Orders & Tickets** screen. One button displays

for each order line item. Pressing one of these buttons opens the **Calculation** screen, which is a read-only display of figures related to the order line item.

Calculation screen (EDTCALP)


Calculation (Project: 200040 / Product: A100)
Estimated Quantity 500,00 cu meter
Total Ordered Amount 15,00 cu meter S
Total Delivered Amount 0,00 cu meter S
Remaining Scheduling Amount 485,00 cu meter
Non-Delivered Scheduling Amount 15,00 cu meter
Ticket Data Out Total 0,00 cu meter

The Calculation screen shows the following information:

- **Estimated Quantity** - Displays the estimated quantity of the line item required for the project. This value comes from the Project Product table and is entered on the Projects screen at the time of project creation.
- **Total Order Amount** - Displays the total quantity of the project product that has been ordered to date. This figure excludes all removed, credit memo, and debit memo orders.
- **S** (button) - Opens the **Detail** screen. Pressing this button displays the ordered quantity of the project product that exists on suspended orders, split by suspend type.
- **Total Delivered Amount** - Displays the total quantity of the project product that has been ticketed to date. This figure excludes any removed, debit memo, or credit memo tickets and any returned quantities are subtracted from the total.
- **S** (button) - Opens the **Detail** screen. Pressing this button displays the ticketed quantity of the project product that exists on suspended tickets, split by suspend type.
- **Remaining Scheduled Amount** - Displays the remaining scheduled amount which is calculated as being the Estimated Quantity minus the Total Ordered Amount.
- **Non-delivered Scheduled Amount** - Displays the remaining scheduled amount that has not been delivered, which is calculated as being the Estimated Quantity minus the Total Delivered Amount.
- **Total Invoiced Amount** - If Invoicing (IG) is in the license, this field will display. This field shows the total quantity of all tickets where an invoice date is present, excluding credit and debit memo tickets.
- **Ticket Data Out Total** - If Invoicing (IG) is not in the license, this field will display. This field shows the total quantity of all tickets where the Data Out Date is not blank, excluding credit and debit memo tickets.

The figures displayed on the **Calculation** screen will not include quantities that have been added or edited for an order until changes have been saved.

Scheduling an Order

When entering a delivery schedule in the system, you need to make sure that the customer receives the ordered material in a timely manner without hindering the timing of your other deliveries. The Scheduling section of the Order Entry screen lets you enter scheduling information specific to the current order This scheduling information is used in Dynamic Scheduling and Truck Tracking to help ensure on-time delivery.

Many of the fields on the Scheduling screensdefault from other files, primarily the project and items files.

Schedules are required for concrete orders.

Scheduling Logic

COMMANDseries creates a new load when the scheduled quantity is exceeded. For example, if a schedule is entered for 60.00 tons, and each load is targeted for 20.00 tons, COMMANDseries creates three loads. If a fourth load is generated, an additional load shows on the Loads screen.

When multiple schedules are entered by plant for one product, the shipping plant on the ticket determines which schedule to update. For example, three schedules are entered for one product. Each schedule is for a different plant. If a schedule is found that matches the ticket's shipping plant, that schedule is updated. If no match is found, the first available schedule is updated regardless of the plant.

To schedule an order:

1. If the order is part of a project, the **Plant** code defaults from the Project record.

   If the order is not part of a project, specify the plant code for the plant from which you plan to ship the scheduled order when it is ticketed.

   The **Plant** field defaults to the most economical plant choice for delivering this order. This can be altered on the Economic Sourcing screen.

   To help you choose a plant, select the button. The screen displays, listing the costs for each plant and the difference in costs between them and the least expensive plant. This screen calculates material cost and delivery cost for each plant for one unit of material (concrete or aggregate), and lists those plants in ascending order by total cost.

Economic Sourcing (SELECON)

Economic Sourcing

Item 2500 Map Page Location User Plants All Plants

Priority	Plant	Item		Cost	Slump	Primary	Variance	Margin	Mileage	Std Haul
001	48 Elken	2500	2500	241.00	3.55	☐	0.00	-206.00	0.00	0.00
002	50 Emmetten	2500	2500	241.00	3.55	☐	0.00	-206.00	0.00	0.00
003	99 RJE Emmetten	2500	2500	241.00	3.55	☐	0.00	-206.00	0.00	0.00
004	2 Susan's Test	2501	2501 PSI	244.00		☑	3.00	-209.00	0.00	0.00
005	251 Birsfelden LP1	2501	2501 PSI	244.00		☑	3.00	-209.00	0.00	0.00
006	43 Birsfelden	2500	2500	261.00	3.55	☐	20.00	-226.00	0.00	0.00
007	00 Birsfelden	2500	2500	261.00	3.55	☐	20.00	-226.00	0.00	0.00
008	2 Susan's Test	2500	2500	10804.00	3.55	☐	10563.00	-10769.00	0.00	0.00
009	251 Birsfelden LP1	2500	2500	10804.00	3.55	☐	10563.00	-10769.00	0.00	0.00

The dispatcher can determine which is the best plant to schedule an order from to receive the most profit.

2. The **Must** checkbox states whether or not an order must finish. Concrete orders default to a state of Must Finish when the mix is designed with TQS, regardless of whether the box is checked or not. For any other mix, this check box must be selected in order to state that the order must finish. To state that an order must finish, check the checkbox.
3. Enter the **Start Time**--the time the customer wants the first load to arrive. This value will be used as the basis for all scheduling calculations. To speed order entry, you can just enter the hour—for example, **9**—and tab through. The system will automatically convert the **9** to **9:00**.

   COMMANDseries defaults to military time. To override this default, for example, if you need to enter 3:00 pm, enter **3p** and press <Tab>.
4. Select a **Truck Type**. This field can default from the Project file. The field can be left blank if a specific truck type is not required.
5. The **Scheduled Quantity** will default to the Order Quantity. You will only need to adjust this field if you use multiple schedules (discussed later).
6. If you wish to suspend delivery on the order after a certain amount has been delivered, enter a **Hold Quantity**. Once this amount has been ticketed, this schedule will be placed on hold. Other schedules on this same order will not be affected.
7. The fields default from the Projects screen or from specific map pages. The values indicate travel time from the plant to the site and back. You can modify these times as needed, for things such as weather or traffic.

   The value entered in the **Time To Job** field is automatically duplicated in the **Time To Plant** field; however, the values can be changed. If the values are changed from the default, the fields will become shaded to indicate that they have been altered.

   If the order is a non-project order, enter an estimated travel time for the drive from the specified plant to the job site, and then back.

   Good service and delivery efficiency are based upon sending trucks at the rate the customer can unload them. There are exceptions, but generally there is no need to send trucks at a 15-minute spacing when the unloading time is 30 minutes.

   Exceptions:

   - The customer wants the first few trucks sent close together but will take longer to unload such as for a footing or foundation wall.
   - The customer demands trucks at a high rate but cannot sustain that rate.
   - The order is being supplied simultaneously from two or more plants. The delivery rate from each plant will be twice (or three times) longer than the rate ordered, as trucks will be scheduled to arrive alternately from each plant.
   - The customer is unloading in several places simultaneously. Here the unload rate will be twice the delivery rate.

   These time values are used to calculate scheduling information used in dynamic scheduling and truck tracking. While dispatchers and order takers frequently have to estimate travel time, it is important that those estimates be as accurate as possible. One underestimated schedule can disrupt the entire day's deliveries.

8. The **Unload Time** value will be calculated based on the **Unload Rate**; the system will calculate the **Unload Time** for each load, so that a 3m clean-up load will be given a proportionally smaller unload time than a standard 10m³. This value can be entered manually; however, manually entered values are static—no changes to the **Unload Time** will be made based on load size.
9. The system will use the information entered thus far to generate a delivery schedule. Before it can complete the calculations, however, it has to know what to use as the primary means of measurement. The options for the delivery **Rate Type** are:

FOB (Freight on Board)

- Enter a **Truck Spacing** time in minutes. The **Unload Time** value will default to this time, but it is irrelevant. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
- The **Trucks Required** field will be cleared of data.
- The material will be picked up by someone else's truck. Accordingly, the system won't worry about truck availability.

For delivered orders, something must be entered in either the **Truck Spacing** or **Trucks Required** fields. If both fields are left blank, the system will consider the order as an F.O.B. order, and the order will not appear on the regular Tracking & Scheduling screen! If only one truck is required, skip the truck spacing and populate the **Trucks Required** field with **1**.

Caution: FOB orders are not displayed on the normal Truck Tracking screen but have a separate screen of their own (Tracking will display FOB orders on the main screen; please consult Tracking documentation for configuration details); consequently, orders that are inadvertently entered as FOB may not get delivered! Please refer to the Tracking and Scheduling section of this manual for additional information concerning FOB orders.

Minutes Apart

- Minutes between trucks' arrival on site -- Enter a **Truck Spacing** in minutes. The **Unload Time** value will default to this time, but can be edited. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
- In all scheduling calculations (or recalculations), the system will make changes in order to maintain the specified Truck Spacing interval, regardless of other factors.

Quantity per Hour

- Tab through the **Truck Spacing** and **Unload Time** fields and enter a quantity per hour in the **Delivery Rate per Hour** field. The **Trucks Required** field will be calculated but disabled; the **Truck Spacing** and **Time** fields will also be disabled.
- Particularly with large pours, the contractor is more interested in making sure that the mix is arriving at a steady rate. This rate keys primarily on individual load sizes.

Quantity per Hour - Unload (Optimization only)

This option is similar to the existing quantity per hour option, but this option will not be affected by the actual pouring rate at the job site. It is intended for use by concrete suppliers who have promised a delivery rate that is independent of the unload rate.

Trucks Required

- Enter a **Truck Spacing** in minutes. The **Unload Time** value will default to this time. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out.
- The **Trucks Required** field will activate (no longer be gray) and allow change. Enter the number of trucks that you wish to use for this schedule.
- This option can be useful when working orders into the schedule later in the day, when most of your fleet is already committed to other orders.

Round Trip

- Enter a **Truck Spacing** in minutes. The **Unload Time** value will default to this time. The **Delivery Rate per Hour** and **Trucks Required** fields will be calculated but grayed out. Tab to the **Rate Type** field and change it to **Round Trip**.
- The **Trucks Required** field will activate (no longer be gray) and allow changes to be made. Enter the number of trucks that you wish to use for this schedule.
- Select the **Loads** button and enter the truck numbers you wish to recycle on this job or use the **Options** menu to enter this data.
- The system will base the schedule on the premise of one truck round–tripping on the order until it has been completely delivered.

10. The system calculates a projected delivery schedule for the order based on current information; however, reality is going to alter that schedule. If a load is ticketed a little late or a little early, how is the system going to adjust the schedule? The **Adjustment Type** field lets you define how the system will adjust the schedule when a load is ticketed early or late. The guiding principle for this function is that the delivery rate is paramount — once deliveries have started, the **Truck Spacing** or **Delivery Rate per Hour** (depending on **Rate Type**) must be maintained to ensure that the final product can be finished adequately. There are four options:
    - **Always adjusted** — If a load is ticketed five minutes early, all subsequent loads for the order will automatically be shifted up five minutes, to maintain the requested truck spacing. If a load is ticketed two minutes late, all subsequent loads will be pushed back two minutes.
    - **When ticketed early** — An order's schedule will only be adjusted when a ticket is printed early. Tickets printed late will have no affect on the calculated schedule.
    - **When ticketed late** — An order's schedule will only be adjusted when a ticket is printed late. Tickets printed early will have no affect on the calculated schedule. This is the most commonly used option, as it allows dispatchers to pre-ticket trucks without disrupting the schedule.
    - **No Adjustments** — The calculated schedule will not be adjusted.
11. To review or modify the delivery schedule, select the **Loads** button on the screen.
12. Edit the information as necessary. When you change a time in the projected schedule, all of the subsequent times will be automatically adjusted to maintain the requested delivery rate. This feature gives you a convenient means of scheduling a break in a delivery, either for a lunch break at the job site or to allow for additional finishing.

    From this screen, you can
    - **Assign loads** from multiple plants.
    - **Roster trucks** by entering the **Truck Code**.

- **Schedule a truck** to return to a different plant, and adjust travel times accordingly.
- **Adjust overall schedule** by changing the **On Job** field.
- **Designate a load** (usually the last load) as a **Clean Up** load. When a load is designated as a Clean Up load, its scheduled ticket time will automatically be adjusted to coincide with the time that the previous load is scheduled to finish pouring. This feature will reduce the disruption that clean up loads can wreak on a schedule.

All **Time To Job** and **Time to Plant** fields have a code beside them. The code designates the source of the field value:

P	Project/plant
R	Project
M	Map Page
N	Map Page-default value
O	Overridden at the schedule level
U	User-entered at the load level
D	Defaulted from schedule--If a user enters a specific time, all subsequent times are recalculated based on the schedule.

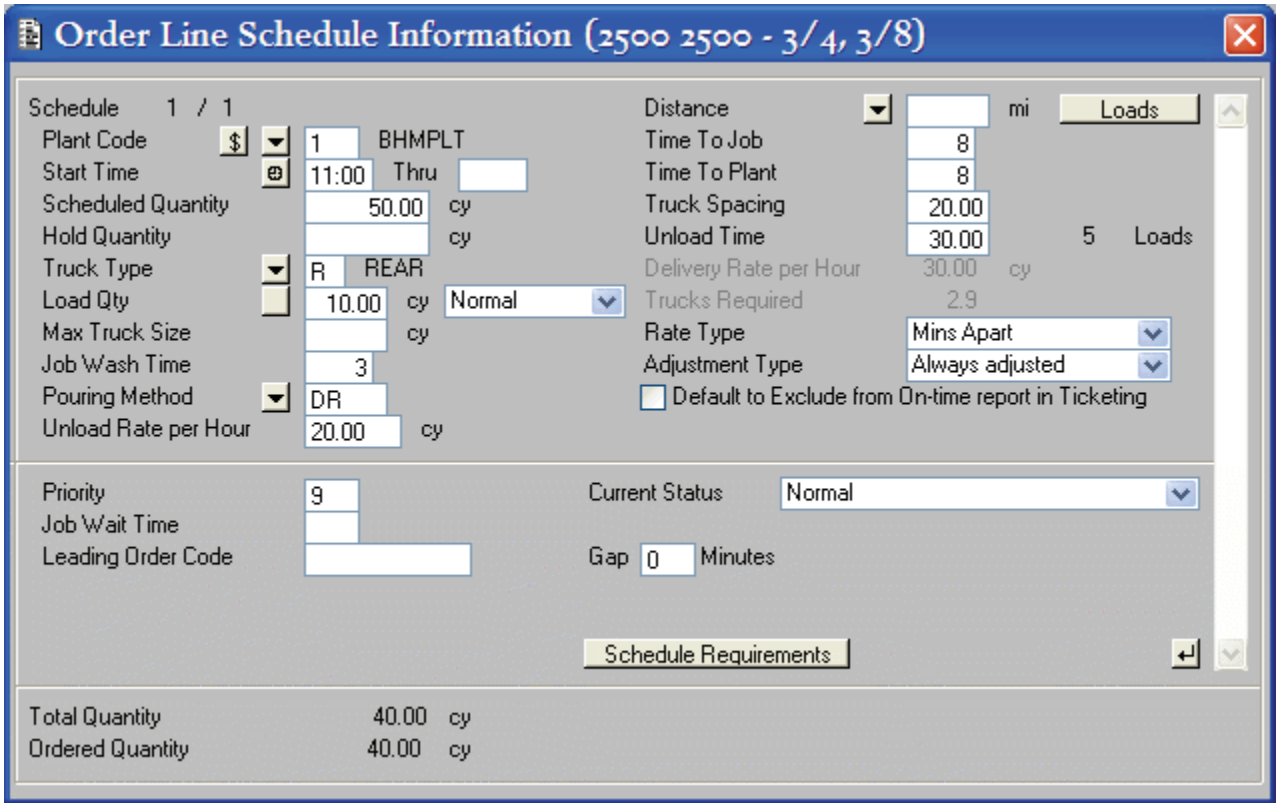
If changes to the schedule are made, be sure to **accept** them.

13. **Accept** the **Order Line Schedule Information** screen to save the scheduling information. The **Scheduling** screen will close, returning you to the primary **Order Entry** screen. If no additional information is required, accept the **Order Entry** screen to save the order. An order number will be assigned and displayed at the bottom of the screen. If you are writing orders on paper forms, then keying them into the computer, write this number on your order form for reference.

Optimized Scheduling

If Optimization is in the system license, a customized scheduling screen displays.

Order Line Schedule Information screen (Optimization-EDTORDO4)



The basics of this form are the same as the standard Order Line Schedule Information screen; there are only a few additional/changed fields.

Start/Thru Time – To provide the Optimizer with some flexibility, you have the option of entering a time range.

Max Truck Size – the maximum load size for optimized operations. This value defaults from the Configuration-Optimization tab; while the field is active, as a general rule this value should never be changed.

Priority – This field assigns a priority to the schedule. `1` is the lowest priority, `9` is the highest. `0` or [null] will be interpreted as `9`. **Note:** A **Default Priority** for all orders can be set on the Configuration-Optimization screen.

Job Wait Time – This field specifies how many minutes should be allowed between the time the truck finishes loading and the time it leaves for the job. This time is used for inspections, batch testing, etc.

This field is linked to a configuration setting in the Optimizer interface that specifies whether this lead time should be applied to every load of the schedule or just the first load.

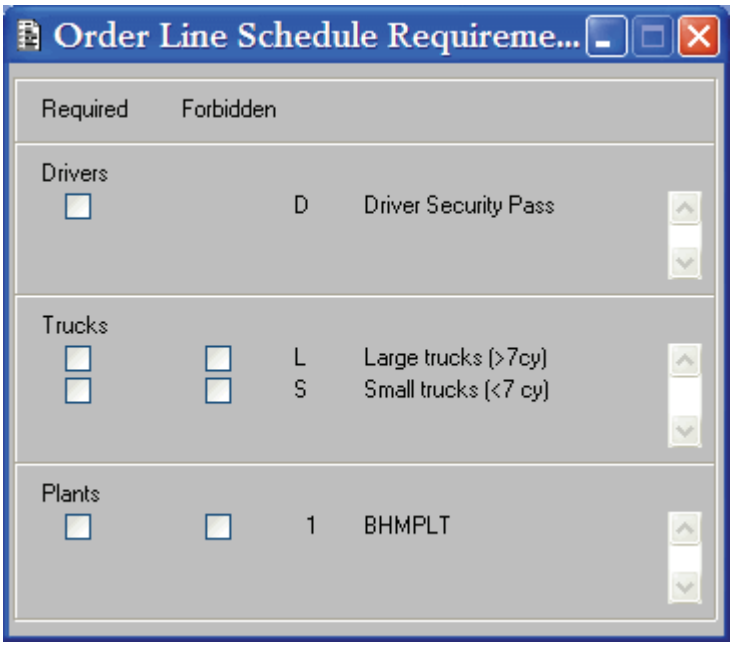
Leading Order Code – If another order must be finished before delivery can begin on this schedule, enter that order code here. Doing so links the orders together for the optimizer.

Gap – The required gap (in minutes between the finish pour time of the leading order and the desired on-job time of the linked order/schedule)

Schedule Requirements

Some orders have specific requirements for driver, truck types and plants. These requirements are entered on this screen:

Schedule Requirements (EDTORDOC)



Only one Driver and Truck Type can be specified for a schedule. These attributes are passed to the Optimizer along with the schedule.

Only plants configured for Optimization (which is done on the Plants-Scheduling tab) are available on this screen. Other options are configured on the Resource Attibutes screen (Files > General Information > Resource Attributes). If a plant (or plants) is flagged as either required or forbidden, then when the screen is accepted, you will be prompted for a reason code. Available reason codes will be codes configured with a Reason Usage of Plant Unavailability.

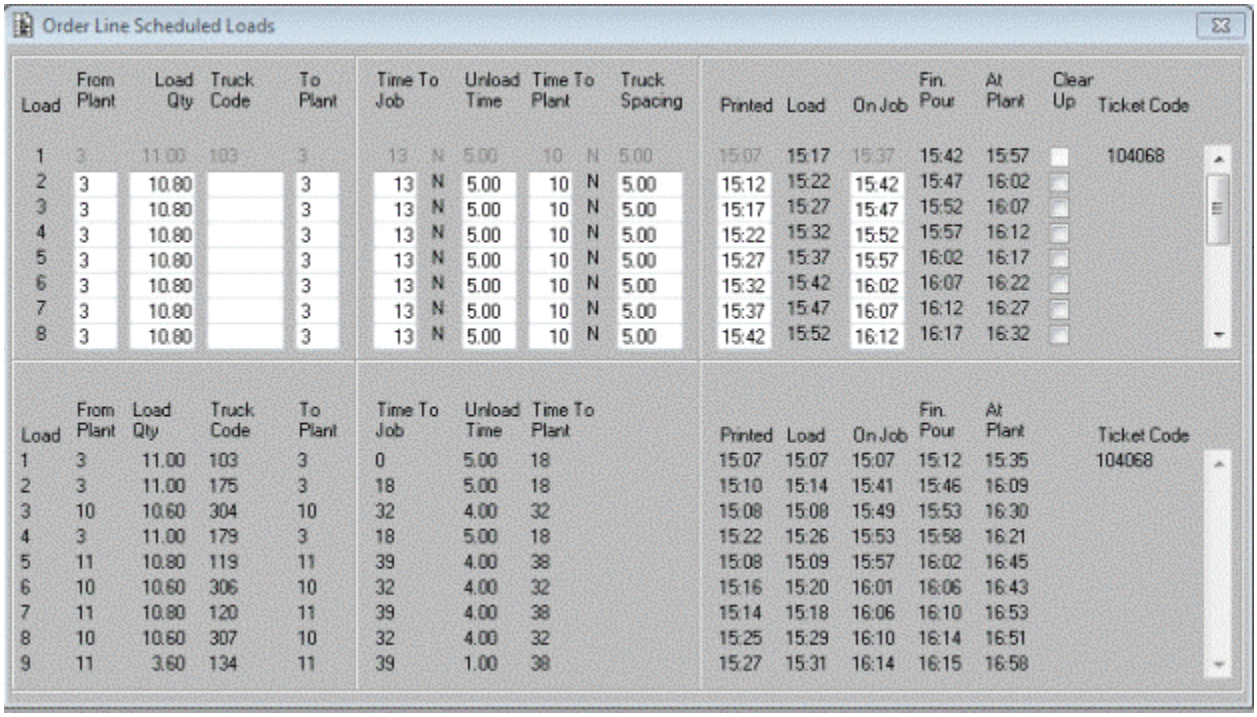
If the **Restrict Loads to Single Plant** checkbox is selected, If this field is set to yes, then the Optimizer will be instructed to optimize the schedule for a single plant. Ticketing has been modified to validate the field on all tickets after the first one. If the flag is set to Yes and you attempt to ship from a plant different than the plant of the first ticket for the order, the system will display a warning message:

```
WARNING:  The Schedule indicates that all loads should be shipped
from a single plant!  The previous ticket was shipped from Plant xxx.
```

If a subsequent ticket is, in fact, shipped from a plant different than the first ticket, the field is set to *No*, preventing the message from displaying on any subsequent tickets.

Optimized Loads

If Optimization is in the license, The Loads button will call and expanded screen:



Changes made in the upper section of the screen will be passed to the Optimizer when the order is accepted; the lower part of the screen will be updated once the Optimizer returns the revised schedule.

Scheduling an FOB Order

To schedule an order as an FOB (Freight on Board) order, enter the start time as the time that the customer will arrive to pick up the order. Leave the right side of the schedule screen blank; FOB displays in the **Rate Type** field. Accept the schedule and return to the Order Entry screen; FOB displays as part of the schedule summary: `F.O.B. @ 13:00 plt 1`.

Previously entered rate information, such as trucks required, will automatically be cleared if FOB is subsequently selected as a **Rate Type**.

Please refer to the Tracking and Scheduling section of this manual for additional information concerning FOB orders.

Simplified Order Entry

Order entry can be fast and easy if you use the Simplified Order Entry screen. This order screen includes the basic functionality of the Orders screen but eliminates the need to enter secondary screens through buttons. All items and their admixtures are displayed on this single screen. The screen is also structured to display customer and delivery information more logically.

To use the Simplified Orders screen as the default order entry screen, mark the **Simplified Orders** checkbox on the Preferences screen {Misc. > Preferences}. To switch from Simplified Orders to regular Orders and vice versa, select **Switch Order Forms** from the Options menu.

- Switching between forms is only allowed when the form is empty. Once order data has been entered, the system will not switch order forms.
- The Simplified Orders screen does not have any **Detail** buttons. Double-click any field to view a list of choices, if any are available.

To enter an order using simplified order entry:

1. Go to the Simplified Orders screen {Dispatch > Orders > Options > Switch Order Forms}.

   Simplified Orders (EDTSORD)

2. Enter an **Order Date** or tab through for the current day.
3. Do not enter an **Order Code** unless the order is already in the system. For a new order, Tab through this field and an order number automatically assigns, according to Next Number settings.
4. Press <Enter>, type a **Customer Code**, or double-click on the field. The Customer Name and related information defaults from the customer file.

   After the customer code is entered, the system automatically checks for the existence of customer projects. If any are found, the cursor moves to the **Project Code** field.

   If no projects are found, the system automatically checks the customer's credit code. What happens next:

   - If the credit code is valid, order entry proceeds.
   - If the credit code is invalid, the system warns you of the problem and returns the cursor to the Customer Code field so you can enter a valid customer.
5. The **Order Type**, and **Payment Method** default automatically when the customer code is entered. (See the *Order Types* section of this manual for additional information regarding order types.)
6. If this is a project order, enter a **Project Code**. Detail or press <Enter> to display of list of projects for the selected customer.

   The system verifies the project's credit code, or the customer's credit code if the project has no credit code. Depending upon the results of the verification, the system behaves as follows:

   - If the customer has been cleared for charge orders only, the **Payment Method** field will display **Charge**. The field will be grayed out; you cannot change it.
   - If the customer has been cleared for both charge and C.O.D. orders, a dialog box will display asking you to select a **Payment Method**: Charge, Cash, Check or Credit Card. Select one, and that option will display in the Payment Method field. The field will be active—you can press the drop-down button to change the payment option.
   - There is a button next to the **Payment Method** field, labeled with a dollar sign (**$**). This button brings up a screen for additional information about the customer's

payment. For checks, you can enter bank and check information; for credit cards, enter account numbers and expiration dates.

- If the customer has been assigned a **Cash Only** credit code, a dialog box will alert you. The Payment Method field will activate; press the drop-down button to select between cash, check, and credit card.
- A dialog box may appear with a customized warning message: **`Contact Credit Dept. before taking an order for this customer`**. Press **OK** to continue. The Payment Method field will then display whatever method has been approved for the customer.
- If the Customer has been assigned a **No Sale** credit code, a dialog box reading No Sale will appear. Once you select **OK**, the order form will clear. You cannot take an order for a customer with a **No Sale** credit code.

If this is not a project order, the system verifies the customer's credit code and then performs one of the bulleted steps above, as necessary.

If the selected customer has no projects, the **Project Code** field will not be available.

7. If you selected a project, the **Delivery Address**, **Instructions**, **Zone Code**, **Purchase Order**, and **Customer Job** default from the customer and project files. Edit this information if desired.
8. If you did not select a project, you nevertheless must enter a **Delivery Address** before you can complete the order. Enter a **Purchase Order**, **Customer Job**, **Map Page**, **Zone Code**, and **Instructions** as necessary.

   In COMMANDaggregate, scheduling an order is optional. If the order needs to be scheduled, continue with this procedure.
9. Enter a mix for this order in the **Item Code** field. The **Description** field defaults automatically.
   - You can enter only one mix per order using the Simplified Order screen.
   - On the **Simplified Order Screen**, you cannot enter an associated product or an extra product unless you first enter a mix.
10. Enter the amount of the order in the **Order Qty** field.
11. Enter the slump or trim, if necessary, in the **Slump/Trim** field. Tab through to continue.
12. Enter associated products and extra products on the lines that follow. When you complete entry on one line, another line displays underneath.
13. Select the **Plant** field and enter the plant from which this order will be shipped. Double-click on the field for plant selections.
14. Enter the remaining information for the order including **Start Time**, **Scheduled Quantity**, **Truck Type**, **Load Size**, **Travel Time** and **Truck Spacing**. At this point, the **Unload Time**, **Quantity Per Hour**, and **Number of Trucks** are calculated and entered automatically. Edit this information if necessary.
15. Select a **Current Status** from the drop-down list:
    - **Normal** — The order has a normal status. The system defaults this status unless otherwise specified.
    - **Will Call** — The order is waiting on a confirmation call from the customer to be shipped. It does not display in the load sequence and has not been dispatched.

- **Weather Permitting** — The order is on hold due to unfavorable weather conditions. It does not display in the load sequence and has not been dispatched.
- **Hold Delivery** — The order has been put on hold for undelivered loads. The undelivered loads are not canceled and should be shipped when the order is returned to a Normal status. It does not display in the load sequence. The loads that were shipped on the order can be invoiced in COMMANDinvoicing.
- **Completed** — The order has been completed. This may occur with loads remaining. The remaining loads on the order are canceled and will not be delivered. The order is not reflected in Truck Tracking. The loads that were shipped on the order can be invoiced in COMMANDinvoicing.

16. Use the **Haul**, **Pricing**, **Other**, and **Scheduling** screens if this particular order requires special pricing, haul or scheduling information that is different from the information in the Customer or Project file. Select the buttons as necessary to edit defaulted project and customer information on the order level.
17. **Accept** the Simplified Orders screen to save the order.

Standing Order Entry

Some customers get the same material every single day. To avoid having to re-enter identical orders day after day, COMMANDseries offers support for Standing Orders. A standing order contains all relevant order information except for the order date and the delivery schedule.

Once the standing order is created, you may use the Schedule Standing Orders function to schedule an order for delivery. The Schedule Standing Orders function uses the standing order as a template to create standard orders for the specified dates. Concrete standing orders must be scheduled before they can be delivered. Aggregate standing orders, on the other hand, can be dispatched or ticketed from a dispatch/ticketing screen. At the time of dispatch ticketing, a daily order is created from the standing order.

When scheduling standing orders, it is important to remember that you can only schedule for a range of days; you cannot schedule a standing order for every other day, or every Friday. In some situations—for example, a customer who gets the same material every Wednesday—it is more effective to copy an existing order than to use standing orders.

Standing orders may be based on a project and may be created automatically from the project file. The contents of the project are automatically moved to the standing order table and the Standing Order code is set to be the Project Code.

One feature that distinguishes standing orders from regular orders is that a standing order requires an expiration date. If there is a project associated with the order, the expiration date defaults from the project. If not, enter the date you want the standing order to expire; a date often selected is the day before the annual price increases go into effect. You cannot create a regular order from a standing order that has expired.

Even though a standing order is created from the Order Entry screen, it is in itself not a true order. Simply creating a standing order will not place the order on the delivery schedule. The Schedule Standing Orders function takes the standing order template and creates standard orders.

Related Topics:

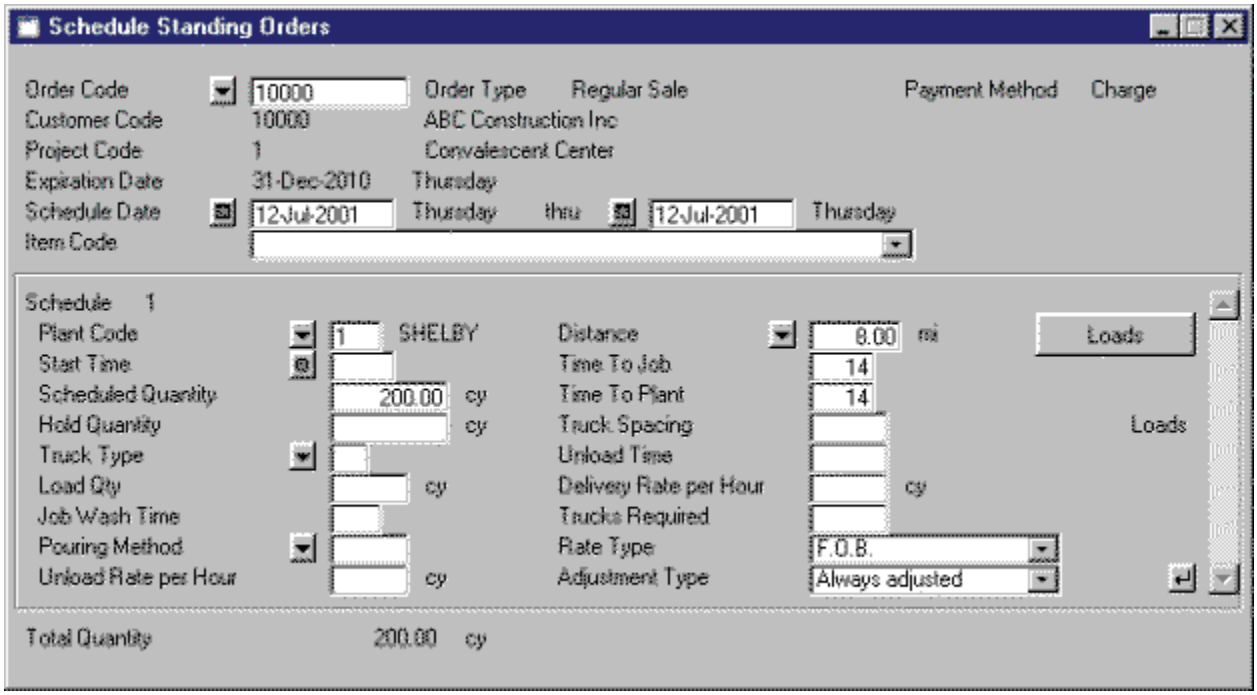
Entering a Standing Order
Switching Between the Standing and Regular Order File
Creating Standing Orders from Projects
Scheduling Standing Orders

Entering a Standing Order

Enter standing orders using the Orders screen. Simply select **Standing** in the date field.

- You can only schedule a Standing Order for Concrete Item Groups.
- If the Standing Order is scheduled from the standard Order Entry screen, a new selection form, Scheduling Standing Orders, will be displayed; only products you select on this screen will create schedule tabs for each product.

Scheduling Standing Order screen (EDTSCHD)



To enter a standing order:

1. Go to the screen {Dispatch > Orders}.
2. Type **S** or select **Standing** from the drop down box in the **Order Date** field, and tab through.
3. Unlike regular orders, which get an Order Code assigned automatically, **Order Codes** for standing orders must be entered manually. You can enter anything you like for the standing order code, but here are some useful guidelines:

- **Use letters** – If you enter a number for an order code, there's a chance that the number will duplicate an existing order code. If you must use numbers, at least consider adding a letter as a prefix.
- **Plan ahead** – The standing Order Code will become a regular Order Code when the standing order is scheduled—it will show up on the Tracking and Scheduling screen. When possible, make the code descriptive: customer code, project code, etc.

4. Continue to enter the standing order as you would a regular order.
5. The **Expiration Date** field is the only field on a standing order that is not in a regular order. Once the specified date is passed, the standing order cannot be scheduled or ticketed. This is a required field.

   A quick way to enter future or past dates is to use the **+** and **–** keys. If, for example, you enter **+30** in any date field and tab through, the system will automatically enter the date 30 days from the current date.
6. Continue entering the standing order as you would a regular order. When you are finished, accept the standing order.

   The Order Quantity on a standing order is the amount needed each time the order is scheduled. It is not the total quantity for the life of the standing order.

Switching Between the Standing and Regular Order File

COMMANDseries order lookups can use one of three order files:

- Regular orders
- Standing orders
- Order/Schedule – This option displays individual delivery schedules

The lookup file in use is displayed on the order lookup:

The default lookup file can be set for a workstation using the **Default Order Lookup** field on the Preferences > General tab {Misc > Preferences}.

Whatever that default is, you can quickly switch lookup files while performing a lookup.

To switch from the Regular Order file to the Standing Order File:

1. Go to the screen {Dispatch > Orders}.
2. Tab through the **Date** field.
3. Double-click in the **Order Code** field.
4. The Choices (Order File) screen appears. Click **Options**.
5. Select **Switch Order File** to change from the regular order file to either the standing order file, the order/schedule file, or vice versa. The lookup screen will change to the selected lookup file.
6. Double-click on the order you want. COMMANDseries loads that order's information into the Order screen.

   A quick way to view the standing order file is to enter an **S** in the **Order Date** field, and detail on the **Order Code** field. This opens the choices screen with the standing order file.

Creating Standing Orders from Projects

If standing orders are relevant for a particular project, create standing orders straight from the project and skip the daily order entry process. The standing order's expiration date is the same as the project's expiration date, unless otherwise noted.

To create standing order from projects:

1. Open an existing project {Files > Customer and Projects Information > Projects}.
2. Review all project information and update as needed.
3. Select **Create/Update Standing Orders** from the **Options** menu. The Order Entry screen will open with the selected project's information pre-loaded. If the project's credit code is set to Cash or Charge, the **Payment Form Selection** screen will open. Select a payment option and accept the screen to proceed to Order Entry.
4. The **Order Date** defaults to **`Standing`**.
5. The **Order Code** defaults to the project code of the project you had open.
6. Review the information, making sure that the new standing order has an **Expiration Date**. If you defined an Expiration Date in the projects screen, it will be used as the Expiration Date on the Order Entry screen.
7. **Accept** the Order Entry screen to save the standing order and return to the project editor.

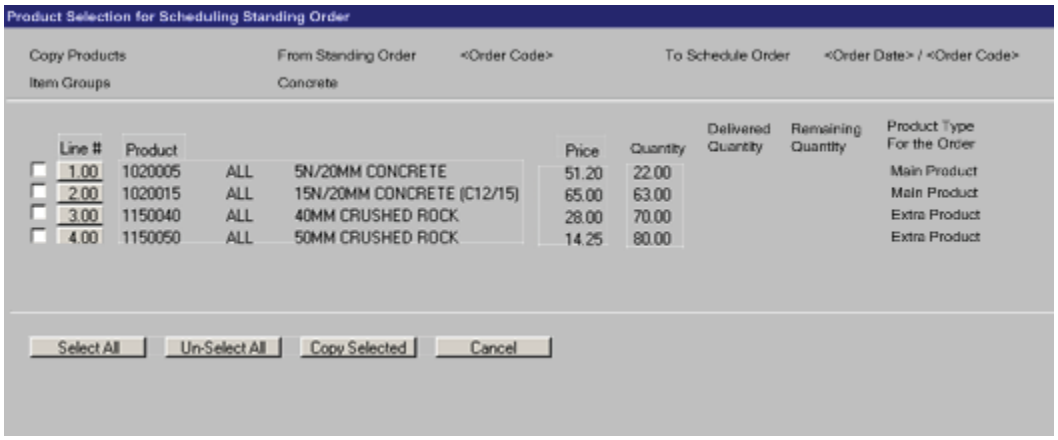
Scheduling Standing Orders

You can schedule standing orders on the **Schedule Standing Orders** screen. The scheduling process lets you enter a date range and schedule information. The system then creates regular orders for every day in the specified date range.

With the tabbed Order Entry screen:

- You can only schedule a Standing Order for Concrete Item Groups.
- If the Standing Order is scheduled from the standard Order Entry screen, a new selection form, Scheduling Standing Orders, will be displayed; only products you select on this screen will create schedule tabs for each product.

Scheduling Standing Order screen (EDTSCHD)

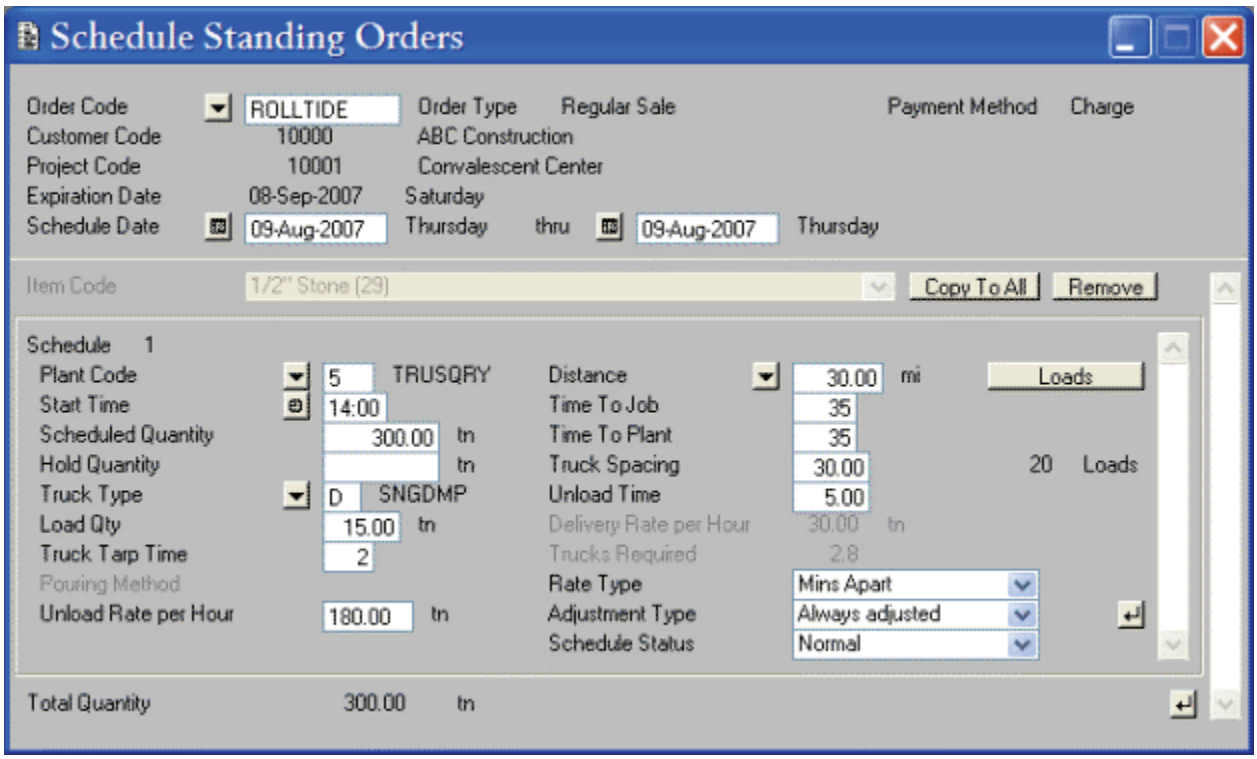


- You can select multiple product lines on this screen; however, only one main product is allowed per selection.
- If you select one main product and one or more extra products, without grouping them, they will default into one schedule tab on the Order Entry form.
- If you select multiple main ready-mix products, you can right-click to Group the items, just like you do already on the Project > Product tab. When you group multiple products with one main product:
  - The checkbox for the main product is selected.
  - The **Plant** will not display for extra products.
  - All products will default into one schedule.
  - Standard delivery quantities are measured individually; customer credit rules remain the same.
  - You cannot select an extra product without selecting the main product first.
  - The **Delivered Quantity** and **Remaining Quantity** are calculated when the above form is called for a specific Standing Order.
- Concrete standing orders must be scheduled before they can be ticketed.
- Aggregate standing orders do not have to be scheduled. If you attempt to dispatch or ticket an aggregate standing order, the system will automatically create a daily order based on the current date and the standing order, and then will dispatch or ticket that daily order.

You can schedule a standing order when rostering to see the order on any tracking screens or if planning the delivery time for specific loads.

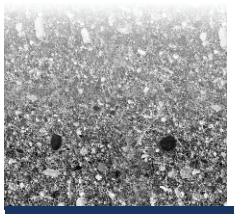
To schedule a standing order:

1. Go to the **Schedule Standing Orders** screen {Dispatch > Schedule Standing Orders}.
2. Enter the **Order Code** for the standing order. Detail to get a list of standing orders. This code will become the Order Code for the scheduled regular orders. The system will retrieve the standing order—additional order information will populate the top part of the form.



- The **Customer Code** defaults from the standing order file. This uniquely identifies the customer of the displayed order.
- The **Project Code** defaults from the standing order file.
- The **Expiration Date** of the standing order defaults from the standing order file. The standing order cannot be scheduled past the expiration date.

3. Enter the **Schedule Date**. This date is the first day the standing order is scheduled for delivery.
4. Enter the **Thru** date. The system will create a regular order for each and every day from the Schedule Date through the Thru date.
5. The **Item Code** is a default value from the Order Entry screen, but may be edited by the load. Use the drop-down list to change the product for a particular load.
6. Edit individual load information for a schedule using the **Loads** button.
7. Edit the **To/From Plant**, **Load Quantity**, or **Truck Code** fields for an individual order using this secondary screen.
8. **Accept** the screen. The system will use the information to create a regular order file for every day in the specified date range. You can see confirmation messages for the new orders by detailing on the message line at the bottom of the screen:
9. These regular order files are completely independent of one another; if you edit or cancel one order, the rest are unaffected.



Advanced Order & Schedule Tools

This section contains information on COMMANDseries features that bring additional functionality to Order Entry and Scheduling. You may not use these features often, or you may use them every day, depending on your business requirements.

Topics in this section:

Customer-Project-Order Lookup
The COD Calculator
The Volume Calculator
Updating Projects from Order Entry
Changing Units of Measure
Removing Orders
Copying and Moving Orders
Order Types
Round Trip Trucking
Truck Unavailability
Truck Counts Screen
Pouring Methods
Order Hold Functions
Bid Price Calculator
Order-Level Mix Design
The Order Tree
The Options Menu
Default Schedule & Pricing Plants in Order Entry
Economic Sourcing
Pricing Authority - Display Percentage Discount
Transport Pricing
Journeys
Multi-Drop Concrete Deliveries

Customer-Project-Order Lookup

The Customer-Project-Order Lookup (CPOL) function lets you list customers, their assigned projects, and their completed orders using general search parameters.

Use the Lookup screen to place an order. It simplifies and speeds up the process by allowing you to populate order information, customer information, and project information quickly and accurately.

The CPOL screen comes up automatically when the Order Entry is opened if the **Use Order Prefix Screen** checkbox is selected in the {Misc > Preferences} menu. Otherwise, it is available from the Options menu in the Order screen {Dispatch > Orders > Options > Prefix Screen}.

To find information using the Customer-Project-Order Lookup:

1. Enter a character, group of characters, or a specific name to search for a customer sort name in the **Name** field. <Tab> to display the results of your search. The system will search your entry for Customer Names, not Customer Codes.
2. If necessary, use the field adjoined to the **Name** field to add single characters to the current search value.
3. If desired, enter a specific **Project Code** and/or **Order Date** to narrow the search. A dash (**-**) in front of the date indicates that the order was canceled.
4. The Customer section displays the results of your Name search. As you highlight a customer, that customer's projects are displayed in the Project section. You may transfer a customer or project to the Order Entry screen by selecting the **Detail** button to the left of the display.
5. Select the **Orders** button to display a chronological (starting with most current) list of the highlighted customer's orders. Selecting the button to the left of the order opens the old or current order for copying or moving.

   The list of orders will include every single order that customer/project has ever had. If your company does not purge expired orders on a regular basis, this list can get quite long and may take some time to load.

The COD Calculator

Whenever a customer places a COD order, the person taking the order must be able to tell the customer what the total will be. The Order COD Calculation function calculates and displays the COD amounts for the order. Any time an order is entered with a Payment Method other than **Charge**, the COD Calculator button will appear on the right side of the Order screen. Press the button, and the total amount due is displayed along with the individual parts that make up the total amount. Calculations are based on the ordered quantity of the products entered on the order. The detail button next to the **Sundry Charges** field displays a detailed listing of all the sundry charges that make up this total on the Sundry Charge Distribution screen. The detail button beside the **Tax Amount** field displays a detail listing of the tax amounts on the Order Sales Tax Distribution screen.

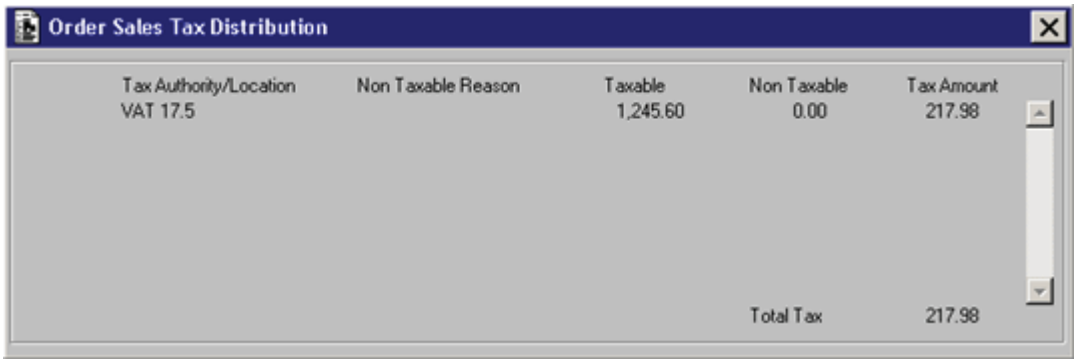
There are two factors that can result in the final total being different from the Order Total listed in the COD Calculator:

- Differences between the ordered quantities and the delivered quantities. This is generally more of an issue for aggregate operations than for concrete.
- Unloading charges, because unloading charges cannot be calculated until after the delivery. Two common means of compensating for this type of discrepancy are to

charge a higher price for COD deliveries, or to let customers know that they may be billed for excess unloading charges.

A detail button next to an amount indicates that there is breakout information on that total. For example, if you press the detail button next to the **Tax Amount**, a screen displays, showing the tax broken down by tax authorities.

Order Sales Tax Distribution - COD Calculator breakout (EDTORDRI)



The Volume Calculator

The Volume Calculator lets you calculate the needed quantity of ready-mix product for any of the following common construction components:

- **Slabs**: Flat, broad, fairly thick, and rectangular blocks.
- **Footings**: A base for walls, columns, etc.
- **Integral footings**: Combination of a slab on top of a footing.
- **Walls**: Vertical dividers.
- **Columns**: Cylindrical solids, caissons, piers.
- **Steps**: On a level grade, a series of vertical steps on a flat base.
- **Stairs**: Self-explanatory.

The Volume Calculator can be accessed from the main menu {Misc > Volume Calculator}, from the keyboard (<Ctrl + B>), or from the Order Entry screen. To access the Volume calculator from the Order Entry screen, press <Enter> while the cursor is in the **Order Quantity** field.

In order to use the volume calculator with a weighted product such as aggregate, each item must have a volume-to-weight conversion factor entered on the Item > Conversion tab.

To calculate a volume amount:

1. Select the a construction component from the Volume Calculator by clicking on its icon.

2. Enter the measured amounts as prompted on the Volume Dimensions screen. The system will calculate the needed volume.
3. **Accept** the Volume Dimensions screen to return to the Volume Calculator screen. The system will round the calculated quantity up to the next 0.25 unit.
4. If you have accessed the Calculator from the Order Entry screen, **accept** the Volume Calculator screen. The system will insert the rounded quantity into the **Order Quantity** field.

Updating Projects from Order Entry

Project information is often incomplete or subject to change when a project is entered into COMMANDseries. As a result, maintaining project records can substantially streamline the order entry process. You can update project information during regular or standing order entry. The following project information is updated: **Purchase Order**, **Job Number**, **Delivery Address**, **Instructions**, **Map Page**, and **Zone**.

Some or all of these fields are updated, depending on which fields differ on the Project and Order screens. If only the delivery address is different, only the **Delivery Address** is updated in the project.

To perform this function, the **Allow Project Updates from Order Entry/Tickets** checkbox on the User editor must be selected {Files > System Information > Users > Options tab}. Users can still perform normal editing functions related to the user's privilege and the current screen. If you are allowed to make project updates, COMMANDseries prompts you as follows:

```
Project information has been changed – Update Project Yes/No
```

To update the project, click **Yes**.

Changing Units of Measure

Every salable item or constituent in the system is assigned a number of **unit of measure** tags (UOM). The UOM tag establishes how that particular item is to be measured at different stages in the business cycle. A unit of measure drop-down menu located on the toolbar lets you toggle between **`Metric`** and **`Customary`** units of measure. However, the option only lets you view the order's quantities in the opposite unit of measure.

Order entry also gives you the ability to enter order line information in the opposite unit of measure. The application, in turn, automatically converts your information to the original unit of measure. For example, if your current unit of measure is U.S. Customary, the entry of **`15m3`** in the **Order Qty** field would be automatically adjusted to **`19.61 cubic yards`** once you have tabbed out of that field.

Removing Orders

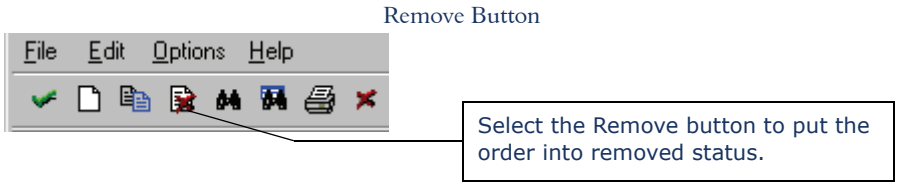
Order screens in COMMANDseries let you remove orders. However, to remove an order, you must supply a reason for removal. These reason codes provide documentation for later reporting.

Selecting the **Remove** button lets you remove (cancel) orders of any status. Removing an order does not actually delete the order from the system, but instead puts the order in a special removed status; this functionality lets you reactivate the order at any time.

- If the order has had any tickets generated against it, it cannot be removed unless all current tickets have been removed.
- Cash orders and tickets that have a reconciled cash receipt attached cannot be removed.

To remove an order:

1. From the Order Entry screen, open an existing order.
2. Select the **Remove** button from the toolbar -or- press <Shift+F5>.



3. Select **Yes** when prompted for a confirmation to remove the order.
4. Before the order can be removed, a **Reason Code** must be supplied for its removal. Reason codes are entered on the Reason Codes editor {Files > General Information > Reason Codes}.

Reactivating Orders

A removed order can be easily reactivated. Bring up the Order Entry screen and enter the removed order's order date and order code. A dialog box will tell you that the order has been cancelled, and ask if you wish to edit it as an active order. Select **Yes** and accept the screen to reactivate the order.

When looking at an order listing, removed orders will be marked with a dash (**-**).

Copying and Moving Orders

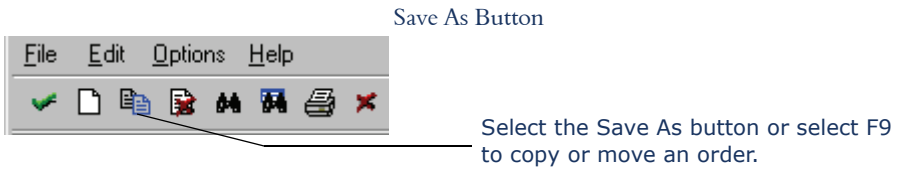
COMMANDseries allows orders to be duplicated or moved to another day. Moving an order is useful when a customer changes his or her order needs. Duplicating orders is extremely useful for regular (weekly, monthly) orders or for repeat orders from the same customer, project, etc.

Customers often call to postpone an order until the following day, or to request an order that is similar to one they have already received. The **Save As** button lets you copy the currently displayed order to a new order, either for the current date or future dates. All delivered quantities are reset to zero.

- When copying a cash order that has a cash receipt attached, if the receipt is not fully allocated, the receipt code is also copied to the new order. If the receipt is fully allocated, no receipt is attached.
- The ordered products and order quantities can be modified, if necessary.

To copy or move an order:

1. Open an existing order, then select the **Save As** button from the toolbar or press <F9>.



2. When copying an order with no tickets, you will receive the following prompt:

   ```
   Copying order - Do you wish to keep the original order?
   ```

   To move an order, select **No**; the original order will be removed. To copy an order, select **Yes**; the original order will be retained.

3. Respond to the next prompt:

   ```
   Do you wish to retain the schedule(s) on this order?
   ```

   To copy the scheduling information on this order, select **Yes**; all the scheduling details from the original order will be copied to the new order. To copy the order with no scheduling information, select **No**.

4. Enter the new **Order Date** and <Tab> through the **Order Code** field to apply the next order code.
5. If you are licensed for Credit Checking, the credit status of the customer and project is checked when the cursor tabs past the **Order Code** field.
6. **Accept** the Order Entry screen to save the new order.

When an order is copied or moved, order information is revalidated based on the settings on the Configuration > Copy Order Revalidation tab. Full information on that tab can be found in the *Setting up the System* manual.

Order Types

An Order type must be assigned to each order in COMMANDseries. This classification not only describes the order, but also determines how the order is processed, from dispatch to invoicing and inventory. Order Types determine whether or not an order gets invoiced, and what sort of inventory transaction is created. This feature provides you with greater flexibility and efficiency in processing transactions.

To better classify sales transactions, you can assign user-defined descriptions to the order types that COMMANDseries provides. User-defined order types are set up on the Order Types tab of the Configuration screen {Files > General Information > Configuration}. For more information on setting up user defined order types, please refer to the Setting Up the System manual.

The **Order Types** drop-down menu on the Order Entry screen defaults to a value according to how you have set up the system. You are not able to override this and select from the order types you have defined if the **Do not allow edit order type in Order Entry** flag is checked in the distribution tab of the Quotes/Customers/Projects editors.

After each user-defined order type is a code in parentheses () that indicates its hard-coded order type.

Each hard-coded Order Type has specific effects on the dispatching process. The hard-coded order types are as follows:

- **Regular Sale (RS)** — Represents all orders for which shipments are made and for which invoices will be created. This may include both Trade and intra-company customers.
- **Job Transfer (JT)** — Represents the shipment of inventoried materials to job sites for intra-company, construction-related activity (e.g., gravel provided to make a base for a plant access road). A Job Cost Phase code {Files > General Information > Job Cost Phase} will be associated with the order to accommodate the needs of the construction job cost environment.

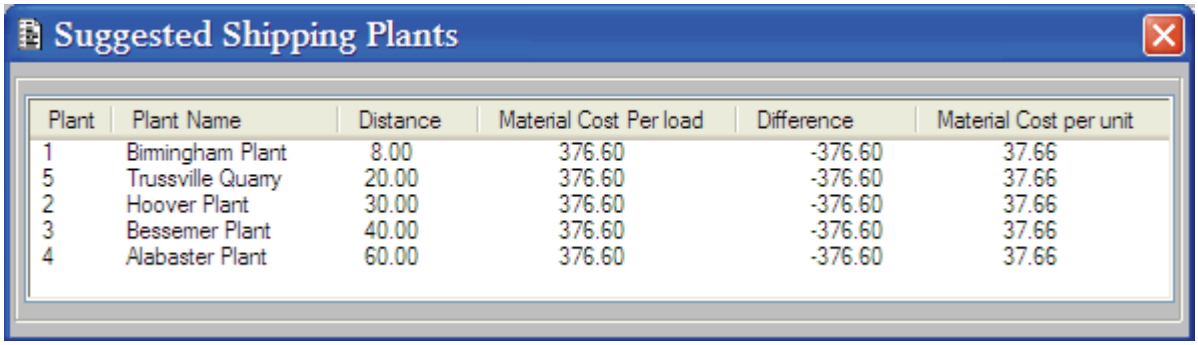
  This order type is intended for use with internal material transfers for a specific job. The order and ticket are processed normally with the following exceptions:
  - The **Payment Method** field will not be available as this is a non-invoiced order.
  - **Job Cost Job** and **Job Cost Phase** will be required. The Job Cost Job is an internal job tracking code, while the Job Cost Phase refers to a set of codes used to track a job through various stages of completion. Both Job Cost Job and Job Cost Phase must be entered into the system in advance {Files > General Information > Job Cost Job} and {Files > General Information > Job Cost Phase}.
- **Review (RV) –** Automatically assigned to any order that is created or edited by an external-access (customer-assigned) user. These orders will display on the Tracking screen, but they cannot be ticketed until a regular user reviews them and changes the status to Regular Sale.
- **Material Transfer (MT)** — Represents inventoried materials shipped to an intra-company plant or business for subsequent sale.

  This order type is used for simple material transfers, in which inventory is being shifted for one reason or another. The order and ticket are processed normally with the following exception: the **Payment Method** field will not be available as this is a non-invoiced order.

Suggested Shipping Plants

An option for scheduling is to use the Suggested Shipping Plant feature {Options > Suggested Shipping Plant}. This screen calculates material cost and delivery cost for each plant for one unit measure of the material, and lists those plants in ascending order by total cost. For your convenience, the difference in total cost between the least expensive shipping plant and the other plants is also listed.

Suggested Shipping Plants (EDTORDRQ)



Plant	Plant Name	Distance	Material Cost Per load	Difference	Material Cost per unit
1	Birmingham Plant	8.00	376.60	-376.60	37.66
5	Trussville Quarry	20.00	376.60	-376.60	37.66
2	Hoover Plant	30.00	376.60	-376.60	37.66
3	Bessemer Plant	40.00	376.60	-376.60	37.66
4	Alabaster Plant	60.00	376.60	-376.60	37.66

The dispatcher can determine which is the best plant to schedule an order from to receive the most profit.

- Cost information must exist in both item and plant files for this feature to function correctly. If cost inforamtion is not entered correctly, the result will be a screen somewhat similar to the one above.
- If you have your system set for Cost Suppression, no costs will display in the screen; the plants will simply be listed in order of profitability, from highest to lowest.

Round Trip Trucking

COMMANDseries supports Round Trip Trucking for orders with a schedule defined as round trip orders. Round trip schedules will set a specific number of trucks to round trip to an order.

Round trip schedules assign trucks to each load in the schedule and base **Type Times for Trucks** on when they will arrive in the yard from their previous load. On the Horizontal Tracking screen, a round trip truck shows on the **Order** line rather than the **Plant** line when returning to the plant.

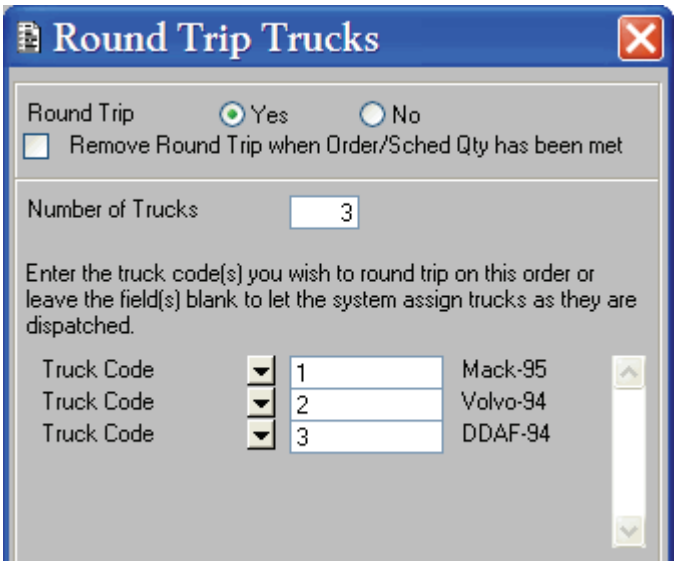
On the Analog Tracking screen, when trucks arrive in the yard, the trucks show—in the yard and on the order—that they are assigned to a specific order in the **Ticketed** status. The truck number is colored based on the Pre-ticketing color assigned in the Conditions setup screen to indicate that the truck is pre-assigned to an order.

Round Trip Trucking is not the same as pre-ticketing. Pre-ticketing involves queuing tickets before the load is actually batched, or before the truck has even returned to the plant. Round Tripping a truck establishes the schedule for the truck, but does not automatically print tickets. A Round Tripped truck, however, can be pre-ticketed.

To schedule a round trip for an order:

1. Go to the Order Entry screen {Dispatch > Orders}.
2. Locate the appropriate order and go to the Order Line Schedule Information screen by pressing the **Scheduling** button.
3. Select **Round Trip** from the Options menu {Options > Round Trip}.

Round Trip Trucks (EDTORDRU)



4. When the **Round Trip Trucks** screen appears, select **Yes** for Round Trip.
5. By default, trucks assigned for a round trip on a schedule will continue to be assigned to subsequent loads even after the schedule quantity has been met. Select the **Remove Round Trip when Order/Sched Qty has been met** chcekbox to prevent addition loads from being ticketed.
6. Enter the **Number of Trucks** that will be needed to deliver the round tripped order.
7. Enter the **Truck Code** of the trucks that are being assigned to the round tripped order.
8. **Accept** the screen.

Truck Unavailability

Nothing can destroy a schedule faster than a truck that has been slotted for a delivery, but which is actually unavailable. COMMANDseries lets you flag a truck as unavailable for specified date and time ranges.

COMMANDseries uses a truck's unavailable status in the following ways:

- An unavailable truck will not appear on the Tracking and Scheduling screen.
- If you try to assign an unavailable truck to an order, either through ticketing, rostering, or dispatch, you will receive an error message that the truck in unavailable.

COMMANDseries can store multiple instances for a truck's unavailability, allowing you to enter information well in advance.

To flag a truck as unavailable:

1. Open the Truck Unavailability screen {Files > Plant & Delivery Information > Truck Unavailability}.
2. Enter the **Truck Code**.
3. Enter the date and time for the **Start Unavailable Time**.

4. Enter the date and time for the **End Unavailable Time**. The system will calculate the total number of days and hours affected by the date range.
5. If necessary, enter an unavailable **Reason Code**. Reason Codes, if present, can help you manage and track unavailability statistics for a large fleet.

   Reason Codes must be set up in advance {Files > General Information > Reason Codes}.
6. If necessary, press the **Add Occurrence** button to enter another unavailability range or **accept** the screen.

Journeys

A journey is a feature of COMMANDseries that allows you to schedule a truck to make one trip with several stops and one product. This typically happens when several customers require a small quantity of an identical product.

Topics in this section:

Creating a New Journey

Editing an Existing Journey

Ticketing a Journey

Creating a New Journey

The **Journey** screen allows you to create journeys in advance to allow you to plan deliveries ahead of time. Typically journeys are created the day prior to delivery using multiple orders placed for that day.

To create a journey:

1. Open the **Journey** Editor {Dispatch > Journey Editor}.
2. Enter the **Journey Date**. Typically this will be tomorrow's date.
3. Enter the **Plant Code** from which the order will be shipped.
4. Tab through the **Journey Code** field to allow the system to auto-assign a value, or enter a custom journey code.
5. The **Truck Code** field is optional, but can be completed if necessary.
6. Enter the **Order Date** of the orders you wish to add to the journey. If you tab through the field, it will default to the current date.
7. Detail on the **Order Code** field and select an order to add to the journey. By default, the list displays orders scheduled from the plant selected in step 3. A different plant can be manually selected if required.
8. The **Journey Status**, displayed at the bottom of the screen, now displays as **`Created`**. The journey status messages that you may see here are as follows:
   - **Created** - The journey has been created but not ticketed.
   - **Ticketed** - The journey has been created and ticketed.
   - **Removed** - The journey has been cancelled.

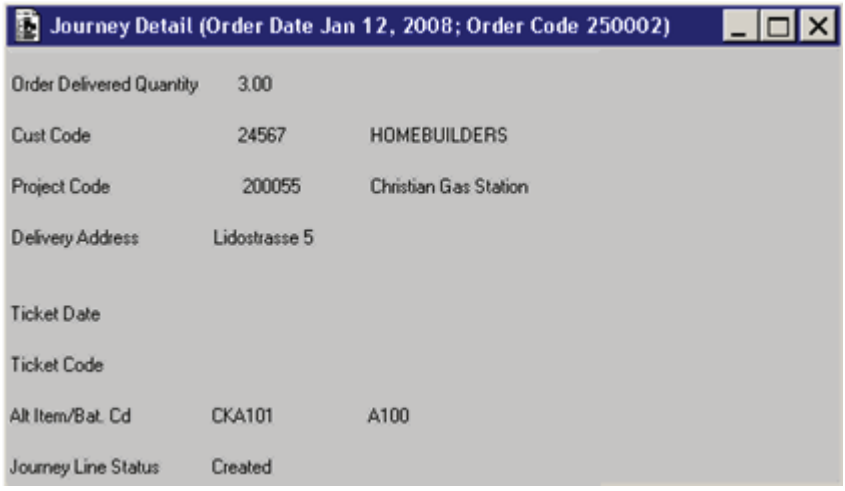
- **Added during Shipping** - The journey was created at the time of ticketing rather than through the Journey Editor.

9. If there is more than one product on the order, the **Item Code** field becomes active. Select the item that you wish to include in the journey. If the order you selected contained only one item, the order date, order code, and item code fields are greyed out and read-only. The **Load Quantity** and **Sequence** fields then become active.
10. Enter any **Sequence** information as necessary. The entries must be sequential numbers between one and the number of stops on the journey. The number represents the order in which the stops of the journey will take place. Accepting the Journey screen with no sequence entries causes the sequence to be saved in the order that the stops were added.

Journey screen (EDTJOUR)

11. The detail button to the right of the sequence field opens the **Journey Detail** screen, which provides additional journey information.

Journey Detail (EDTJOUR0)



12. Notice that the **Journey Line Status** displayed at the bottom of the screen now displays as `Created`. The journey status messages that you may see here are:
    - **Created** - A journey stop has been created but not ticketed.
    - **Ticketed** - A journey stop has been created and ticketed.
    - **Removed** - An existing journey stop was removed at the time of ticketing.

- **Added and Ticketed** - A new journey stop was added at the time of ticketing.

13. To add another order to the journey, tab through or hit <F6> and repeat steps 7-10. The order that you select from the list must contain an identical product to the first. If you select an order with a different product, you will receive the following message: "**`Can't add different mix products on the same Journey`**." You will then be able to select a different order. Repeat this process until all the necessary orders have been added to your journey.
14. **Accept** the journey.

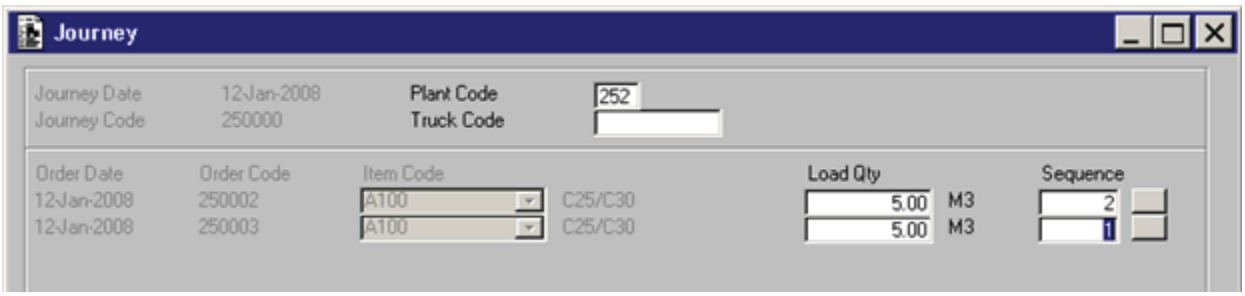
Editing an Existing Journey

Once a journey has been created, it may be necessary to re-order, add or remove orders.

To edit a journey:

1. Open the **Journey Editor** {Dispatch > Journey Editor}.
2. Enter the **Journey Date** and the **Plant Code** from which the order is to be shipped.
3. Detail on the **Journey Code** field and select a journey.

Journey screen (EDTJOUR) - Edit journey sequence



4. The screen is populated with journey information. You can now edit the **Load Quantity** and **Sequence** entries as required.
5. You can also add new stops/orders to the journey by tabbing onto the next line, or pressing <F6>.
6. **Accept** the changes.

Ticketing a Journey

Once you have created a journey, you must ticket each of the orders on that journey. COMMANDseries provides a convenient way to do this all at once.

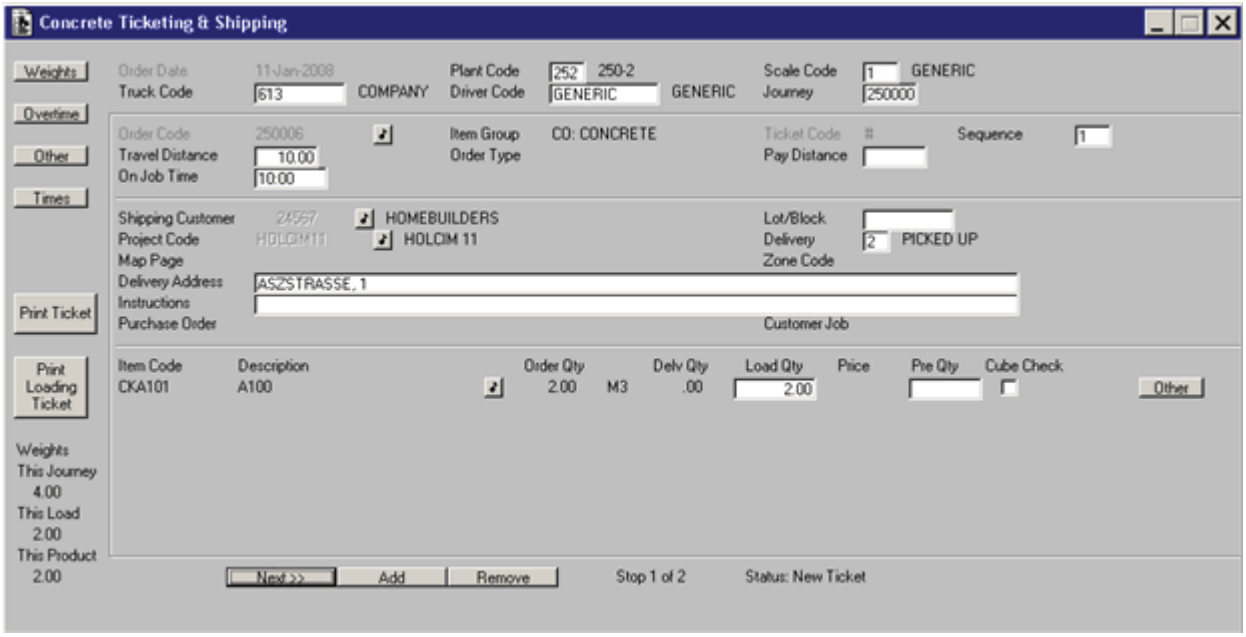
To ticket a journey:

1. Open the **Concrete Ticketing & Shipping** screen {Dispatch > Concrete Ticketing & Shipping}.
2. The **Order Date** defaults to the current date. If necessary you can change this once the plant code field has been completed.
3. Enter the **Plant Code**, **Truck Code** and **Driver Code** as necessary.

   If a truck code was entered on the **Journey Editor**, it is not necessary for the truck code in this screen to match.

4. Detail on the **Journey** field and select a journey from the list. By default, the list contains only journeys planned for the present date.
5. You will now see each stop in the journey automatically loaded into the ticketing screen. You can navigate through the tickets using the **Next** and **Previous** buttons.

Concrete Ticketing & Shipping (EDTSHIP) - Ticketed journey



6. To add a stop/order to the journey at this point, press the **Add** button. This adds an occurrence to the screen and allows you to select an **Order Code** to add to the journey. Tab through the **Ticket Code** field to create the new ticket. You can also remove any stops that are not required by navigating it and pressing the **Remove** button.
7. **Accept** the screen. The journey stops are ticketed and the journey is updated with any changes made to its stops and/or sequence.

Once a journey has been ticketed changes can no longer be made. One ticket instruction is sent to the batch panel for all individual journey tickets.

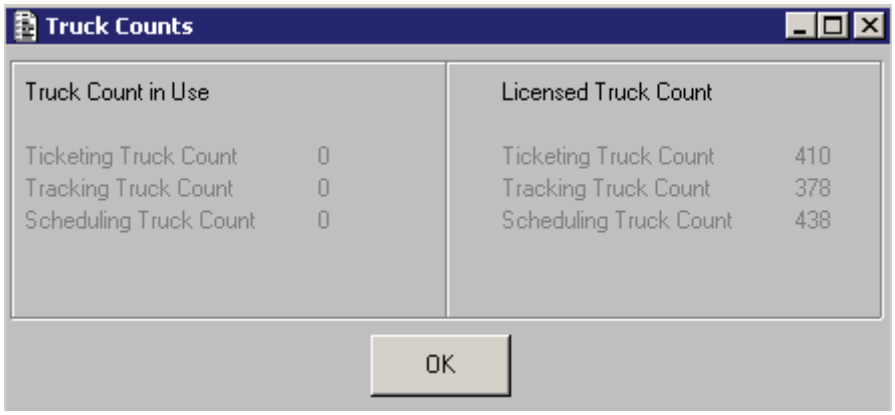
If you view the details of a completed journey in the **Journey Editor**, pressing the detail button opens the **Journey Details** screen and lets you view the completed journey information.

Truck Counts Screen

COMMANDseries dispatch licensing is based on a maximum number of trucks being used at a given time. The Truck Counts screen lets you compare your current truck use against your license limit, as well as display current ticketing, trucks (including licensed trucks), and scheduling counts. By tracking the number of trucks that are punched in service on a daily basis, COMMANDseries can monitor the number of licenses in use. If you punch in more trucks than you are licensed for, you will receive an error message stating that the daily maximum truck allowance has been exceeded.

Go to {Files > System Information > Truck Counts} to view the Truck Counts form. It will display with current ticketing, tracking, scheduling, truck, and licensed truck counts.

Truck Counts screen (DBALICN)



The form retrieves its information from the Licensing (LICN) table. You can view the corresponding information on the Concrete, Tracking, and Scheduling tabs on the License editor.

Field-level security can be set for the form in the Users editor.

Pouring Methods

Pouring methods allow for more standardization in the use of pouring methods, letting you establish a number of common pouring methods and linking them to an appropriate unloading time. Having these values available prevents the order taker from having to estimate unloading rates while talking to the customer.

Pouring Methods are entered into the system in the **Pouring Methods** screen {Files > Plant & Delivery Information > Pouring Methods}. Some examples of possible Pouring Method options are:

Pouring Method	Rate/CY	Comment
Standard	5 min	A baseline rate, particularly useful if all the company's trucks are the same type
Pump	2 min	We're going for volume here, not neatness
Curb	15 min	Curbs take time to do properly.
Wheel barrow	10 min	In some cases, mix must be poured into a wheelbarrow and transported to its destination.
Front loader	4 min	If the you have different truck types, you might need separate pouring methods for each.

There are two basic ways of setting up pouring methods:

- Based on method of delivery (front loader, pump, etc.)
- Based on the type of construction being made (slab, sidewalk, etc.)

These two options are not an either/or proposition; you can set them up any way you want.

Once a Pouring Method has been established, it can be used by entering its assigned code in the **Pouring Method** field on the Order Line Schedule Information screen.

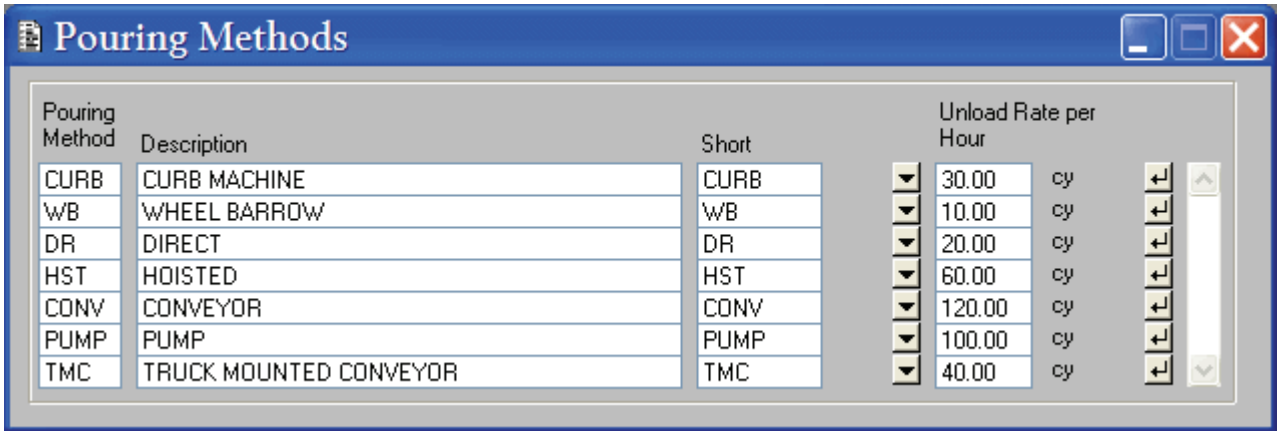
In addition to considering what pouring methods are needed, you might also want to consider if your unloading charge practices should mirror your pouring rates. If a company can let you know ahead of time that more pouring time is necessary, do you want to charge the company the same as another customer that cannot supply advance notice? You might end up with one or two unloading charge tables for each pouring method.

Pouring methods cannot be set at the project level.

To enter pouring methods:

1. Open the Pouring Methods screen {Files > Plant & Delivery Information > Pouring Methods}.

Pouring Methods (EDTPMET)



2. Enter a **Pouring Method** code to identify the entry. The code can be alphanumeric, up to four characters in length.
3. Enter a **Description** of the method.
4. Enter a **Short** description of the method.
5. Enter an **Unload Rate per Hour**. Detail on this field to select a rate UOM.
6. Press **Add Occurrence** to add another pouring method, or **accept** the screen.

Order Hold Functions

An order can be designated as a hold order in one of two ways:

- The entire order can be placed in **`Hold Delivery`** status on the Order Entry screen. Orders are generally not placed on hold when they are initially entered; if the customer is uncertain that the material will be needed, the order can be placed in **`Will Call`** status.
- A **`Hold Quantity`** can be specified in the delivery schedule. When an order has a hold quantity value, the order will display as a normal order until the hold quantity amount has been ticketed. Once the amount has been ticketed, the order is automatically placed

on hold. When the customer confirms that more material is needed, the order can be returned to normal delivery status.

The order hold function has an immediate impact on Tracking and Scheduling.

If an order has a hold quantity but that quantity has not yet been ticketed, that order displays normally on the Tracking and Scheduling screen. The full ordered quantity is displayed on the order line, and all loads, including those that may be affected by the hold quantity amount, are displayed.

Once the hold quantity has been ticketed, and the order placed in a hold status, two things happen to the Tracking and Scheduling screen:

- The order is still displayed on the screen, but the **Ordered** and **Delivered Quantity** fields change color to white. If the **Plant** is displayed in the final column, that field is changed to white as well.
- All loads placed on hold disappear from the **Orders to Load** column.

Bid Price Calculator

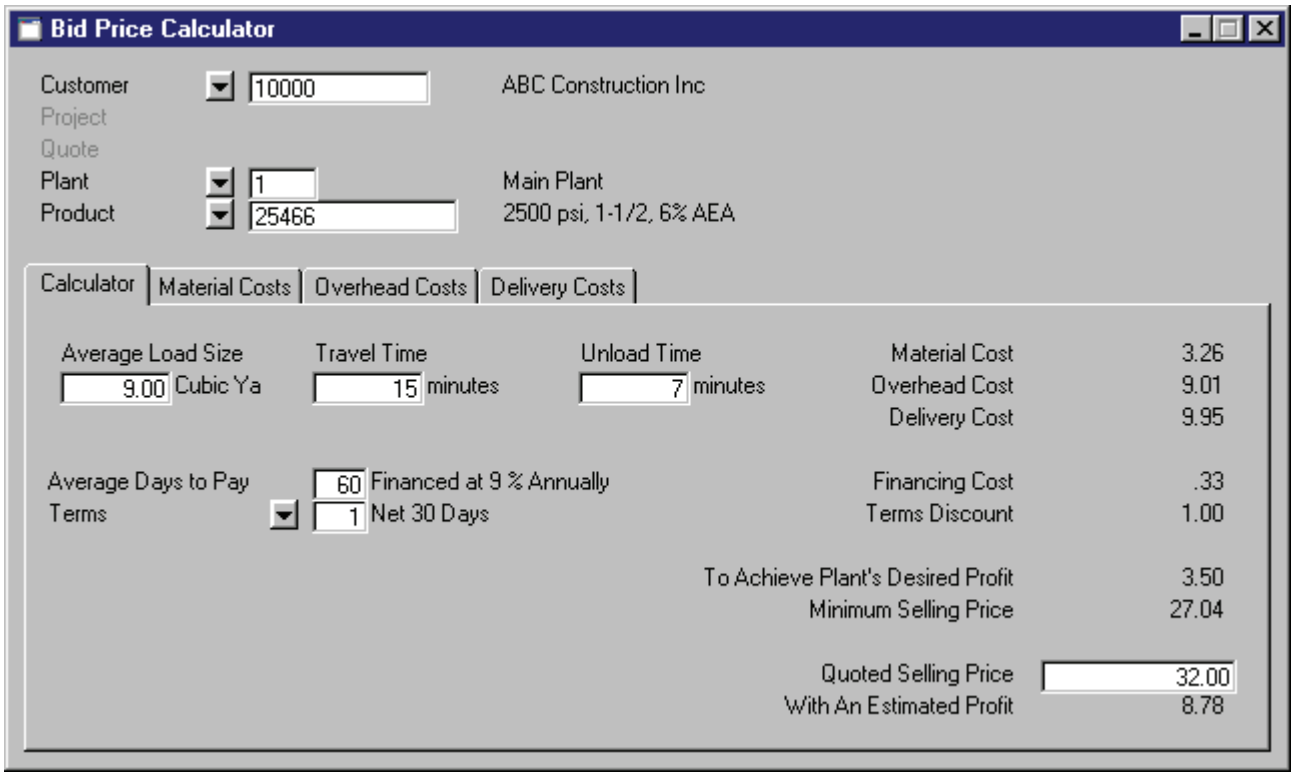
The Bid Price Calculator {Misc > Bid Price Calculator} is used to calculate a realistic bid price based on costs and desired profit according to specified product and plant related information. This feature can be called from the COMMANDquote module, or from the Misc menu. The calculator provides material, overhead, delivery, and finance costs, and computes the minimum selling price required to meet the plant's desired profit. The minimum selling price is automatically updated when other variables are changed. The Bid Price Calculator is used mainly by salespeople.

The following values are displayed on the Calculator tab:

- **Material Cost** - Represents the total estimated cost of materials for this product (per cubic yard or meter). This value may differ from plant to plant. A detailed breakdown of the cost can be viewed on the Material Costs tab. This information is retrieved from the Item Master file for the product and plant entered.
- **Overhead Cost** - Represents the total cost of overhead expenses (per cubic yard or meter). This value may differ from plant to plant. A detailed breakdown of the cost can be viewed on the Overhead Costs tab. This information is retrieved from the Plant file and represents estimates of the cost required to cover the overhead expenses.
- **Delivery Cost** - The total estimated cost of delivering the product (per cubic yard or meter) from the plant to the job site. A detailed breakdown of the cost can be viewed on the Delivery Costs tab. This data is retrieved from the Plant file and, with the **Average Load Size**, estimated **Travel Time**, and **Unloading Time**, is used to calculate the cost of delivering the product to the site.
- **Financing Cost** - Represents the cost of financing the sale of the product, based on the annual finance charge rate in the company file, and is affected by the value entered in the **Average Days to Pay** field.

- **Terms Discount** - Represents the discount, if any, that applies to the current product. The discount is determined by the terms that have been set up in the terms code.
- **To Achieve Plant's Desired Profit** - Represents the amount added to the total product cost to achieve the plant's desired profit. This information defaults from the **Desired Profit Per Quantity** field on the Plants screen {Files > Plant & Delivery Information > Plants}.
- **Minimum Selling Price** - Represents an estimate of the lowest price at which this product should be quoted. The value is a sum of all product costs plus the amount required to achieve the plant's desired profit minus any applicable terms discounts. The value in this field is affected by all cost and discount fields located above it on the screen.
- **Quoted Selling Price** - Represents an estimate of the amount at which you are bidding the product to be sold, per cubic yard or meter. Enter a value in this field based mainly on the amount in the **Minimum Selling Price** field.
- **With An Estimated Profit** - Represents the estimated profit per cubic yard or meter that will be gained if the product is sold at the price in the **Quoted Selling Price** field. A value will not appear here until a quoted selling price has been entered.

Bid Price Calculator (FNDBPRC1)



To use the Bid Price Calculator:

1. Go to the **Bid Price Calculator** {Misc > Bid Price Calculator}.
2. Select a **Customer** and **Plant** for which to estimate bid price. If available, enter a **Project** and/or **Quote**.

3. Select the **Product** for which to estimate bid price. The calculator calculates the price according to information set up for this product at the plant and customer level.
4. From the **Calculator** tab, enter the **Average Load Size** for the product. This value represents the average size of a truckload of the product. The unit of measure for the product, defined on the Items editor {Files > Item Information > Items}, defaults into the area to the right of the field.
5. Enter the **Travel Time**, in minutes, from the plant to the job site. This field affects the value in the **Delivery Cost** field. As travel time increases, so too does the cost of delivery.
6. Enter the **Unload Time**, in minutes, to represent the amount of time from the truck's arrival at the site to the time the product has been unloaded. This field affects the value in the **Delivery Cost** field. As unload time increases, so too does the cost of delivery.
7. Enter the **Average Days to Pay**. This value represents the average number of days the typical invoice will be outstanding in Accounts Receivable. The annual percentage rate defaults from the plant file and represents the cost of financing the outstanding receivable. Therefore, the value in the **Financing Cost** field grows larger with the increase in days to pay.
8. Select a **Terms Code** for the bid. This code uniquely identifies the payment terms and any discount being offered for the customer or project, and the resulting invoices.
9. Using the amounts in the various cost and adjustment fields along the right side of the screen as reference (especially the Minimum Selling Price), enter a **Quoted Selling Price** for the product per cubic yard or meter. When a value has been entered here, the **With An Estimated Profit** field displays the estimated profit that will be gained if the product is ultimately sold at this price.
10. Review the contents of the **Bid Price Calculator** and change amounts as necessary. The cost and adjustment field values are recalculated immediately.

The **Material Costs**, **Overhead Costs**, and **Delivery Costs** tabs let you see details of how the various costs are calculated.

Order-Level Mix Design

The Order-level Mix Design feature lets users with appropriate access design a mix from the Order Entry screen. This mix design will be available only for the current order. This functionality is useful when it is necessary to work around specific restraints, such as weather conditions and loading times.

To set up Order-Level Mix Design:

In order for a user to be able to use order-level mix design, two system flags must be set:

1. Open the Distribution tab of the Configuration screen {Files > General Information > Configuration}. Select **Allow Order Level Mix Design** to activate the feature at a system level.
2. The **Default Mix Design Approval Status** flag determines the operational requirements of the feature. Select one of the following options:
   - **`Mix Not Approved`** (the most common selection) - The system will not ship the mix until someone with appropriate system privileges retrieves the order, opens the

Order Line Mix Design screen, and checks the **Mix Design Approved by Quality Control** box.

- **`Mix Design Approved`** - Modified mix design can be shipped immediately.

Configuring Order-level Mix Design

Allow Order Level Mix Design
Default Mix Design Approval Status
Mix Design Not Approved
Mix Design Not Approved
Mix Design Approved
Generic Location for Mix Conversion

3. **Accept** the configuration settings
4. Open the Options tab on the Users editor {Files > System Information > Users > Users}.
5. Select **Allow Access to Order Level Mix Design** to let a given user use the feature.

Warning!

If you use Order-level Mix Design, you must ensure that anyone authorized to enter order-level mix designs is qualified to do so as the design might not be reviewed prior to shipment!

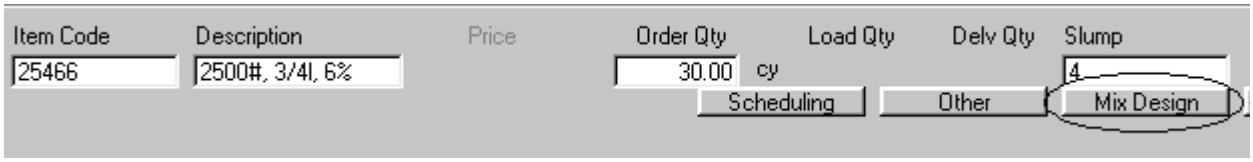
Please refer to the *Setting up the System* manual for additional information on configuring these two flags.

Once the system has been set up for order-level mix design, you are ready to edit a mix from the Order Entry screen.

To perform order-level mix design:

1. Open the Order Entry screen and create an order as normal.
2. When the system is set up for order-level mix design, the **Associated Products** button on the main Order Entry screen becomes the **Mix Design** button.

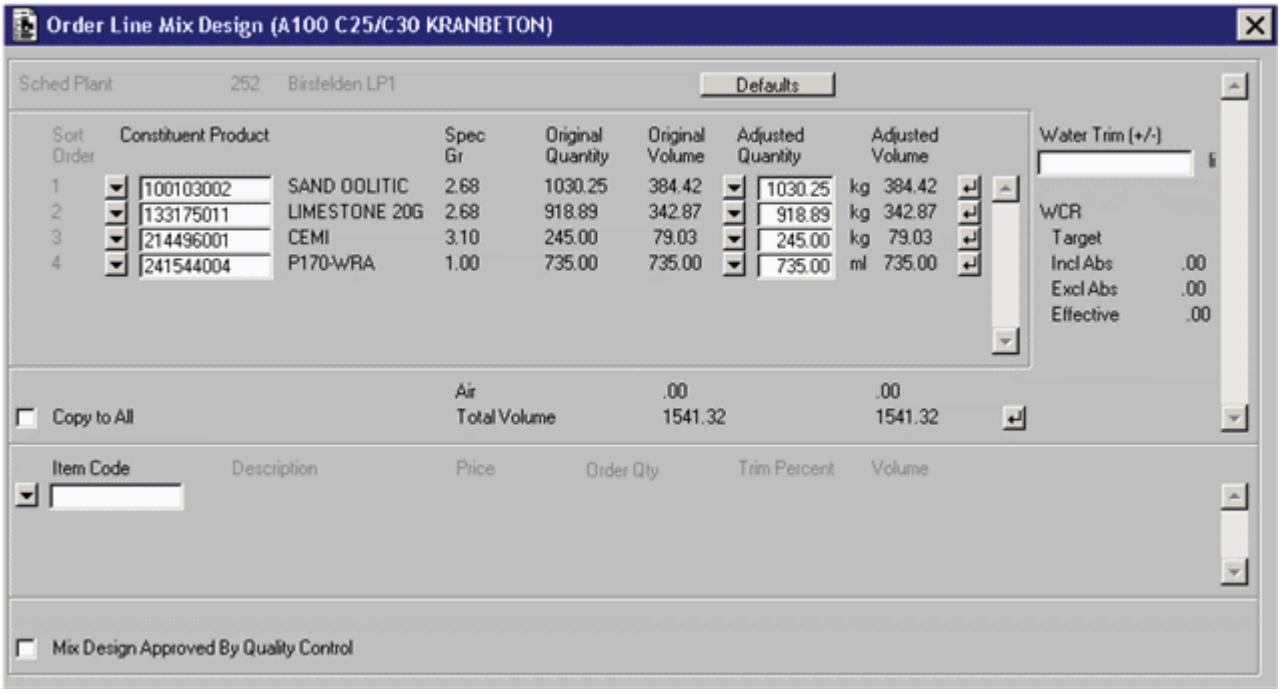
Order Level Mix Design-Order screen



3. After entering a mix and an **Order Quantity**, press the **Mix Design** button.
4. The **Order Line Mix Design** screen displays. The screen title bar will also show the selected mix.
   - If you are licensed for the Technical Quotation System (TQS) and use it to create a mix, opening the Order Line Mix Design screen will only let you view the mix details; you cannot edit them.

Order Line Mix Design screen (EDTORDRP)

Order-Line Mix Design screen (EDTORDRP)



5. Enter the **Scheduled Plant**.
6. If you want to begin with the standard mix design, press the **Defaults** button. The mix design for the mix at the selected plant will display.
7. The **Sort Order** number automatically displays in this field. If changes are necessary, detail on the field to adjust.
8. For each item in the mix, enter a **Sort Order**, the Item Code for the **Constituent Product**, and the **Quantity**. Use the **Add Occurrence** button to add additional constituents.

   All constituents included in this section of the screen will be included in the base mix price. To add an item for which the customer will be charged extra, use the **Item Code** field below.
9. If the order is to be shipped out of multiple plants, you have two options:
   - Select the **Copy to All** checkbox to make the design available at all plants.
   - Select the **Add Occurrence** button to the right of the **Copy to All** button. A new design form will appear, allowing you to enter a separate mix design. You can scroll between these mix designs using the scroll bar on the right of the screen. This feature may be useful if plants have different constituents on hand.
10. If you want to add an associated product, one for which the customer will be charged extra, enter the product's **Item Code**, **Order Quantity**, and **Trim Percent.**
11. The **Mix Design Approved by Quality Control** checkbox determines if the mix can actually be shipped. Use field-level security to restrict access to this field to QC engineers.
12. **Accept** the screen to save the mix design and return to the Order Entry screen. The **Mix Design** button will be highlighted to indicate that a mix design is present.
13. Schedule and save the order as usual.

The modified mix is stored at the user level, and has no effect on the mix design in the Item Master File. Once the order has been created, the sequence of events is dependent on how your system is configured.

Product Sales Option

The Product Sales Option simulates a Point of Sale environment in Orders by providing an inventory inquiry for products ordered and an automatic generation of a ticket from the Orders screen. It also provides for limited reporting capability for block equivalent units.

You must have a license for the Product Sales Option unless you use COMMANDinventory; however, without the inventory license, you cannot query on-hand inventory amounts.

To set up the product sales option:

1. From the Locations screen {Files > Item Information > Locations}, set up an inventory location and a corresponding plant {Files > Plant & Delivery Information > Plants} for the block/building material operation.
2. Assign the plant to specific ticket printers for dispatch copy order printing and report printing on the Plant Communication Setup screen {Files > Plant & Delivery Information > Plants > Communication tab > Setup}.
3. Set up a standard unit of measure to provide equivalent units for block products. It should be in the **`80000`** range, and assigned as an **`Other`** Unit of Measure Type. Otherwise, it can be set up similar to **`80001 - Each`**.
4. Set up an item category (or categories) for block, building materials, etc. There are item types for both of these. The UOMs for this category should all be **`80001 - Each`**, except for the reporting UOM for the Block category, which should be assigned the equivalent unit's UOM. For non-block products, the reporting UOM should be the same as all other UOMs.
5. Assign the block and building material products to the appropriate item category. For block products, the **Conversions** button on the UOM form will be used to assign the equivalent units conversion factor for each product. Typically, for block products, sales are stated in terms of equivalent units, with an 8 X 8 X 16 block equaling one (1) EU. The conversion can be either from the product's delivered quantity UOM - 80001 - to the reporting UOM - or vice versa, at the appropriate conversion factor. Therefore, a 4 X 8 X 8 block would need a conversion factor set up in one of the following manners:

Convert from UOM	Convert to UOM	Multiplier
Del Qty UOM 80001 -or-	Rept UOM 800??	.35
Rept UOM 800??	Del Qty UOM 80001	2.85714290 (which is 1/.35)

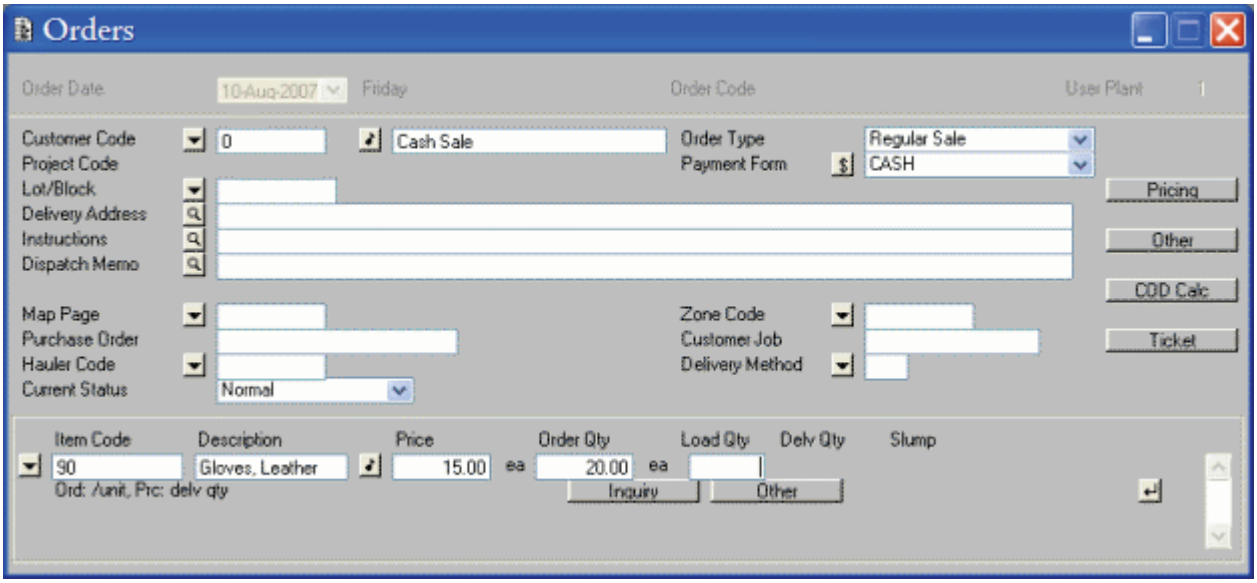
   All block products, including the standard 8 X 8 X 16, must have a conversion factor even when that conversion factor is 1.0.
6. The user record {Files > System Information > Users > Plant} for users who will run orders and tickets for this feature, must be set up with the plant assigned as the block/

building materials plant. This will serve as a default plant in Orders for performing the inventory inquiry, and in Tickets for assigning the shipping plant.

To use the product sales option:

1. Enter information on the Order Entry screen as normal.
2. If you enter a non-concrete product in the **Product Code** field, two new buttons display on the screen: **Ticket** and **Inquiry**.

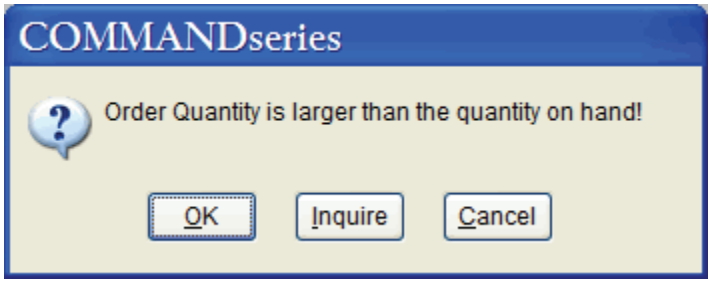
Orders screen (EDTORDR)



The **Inquiry** button will only appear if you are licensed for COMMANDinventory.

3. Enter the quantity in the field. This quantity is checked against the inventory of the product at the assigned plant.
4. Press the **Inquiry** button to see how much of the item is on hand at the plant. A warning message is displayed if the ordered quantity exceeds the quantity available.

Inquire Warning (QTYWARN)



5. Press the **Inquiry** button to go to the Item Inquiry screen. You can select another plant from which to make the order, or you can select OK and ticket the order. Selecting **OK** will result in a negative inventory balance.
6. When you have completed the order, press the Ticket button. This will automatically produce a ticket at the default plant.

7. If this is a cash order, press the **COD** button to produce the **Order Total Amount** before the ticket is generated.

The Order Tree

The Order Tree {Dispatch > Order Tree} gives you a powerful and flexible means of navigating through your order history. It lets you search, sort, and display all orders in your system based on the criteria you specify.

The Order Tree is designed to resemble the organization of Windows Explorer, using folders that represent roots and branches. The base level of organization is called the "root." At this level, orders are sorted into folders based on specific criteria. For example, you might want to sort your orders based on Order Date and Customer Name. Each folder at the root level would be labeled with a specific Date/Customer combination.

Within each root folder are "branches." The branches, or folders, closest to the root level are the individual orders. You can control how these folders are labeled to expedite order identification.

Each Order folder contains folders for each mix and extra product on the order. Within each mix folder are file icons representing the delivery schedule and any associated products.

Navigate through the Order Tree by clicking on the **Plus** and **Minus** buttons to the left of the folder. This expands or collapses the folder, respectively.

Topics in this section:

Configuring the Order Tree

Right-Click Mouse Functionality Using the Order Tree

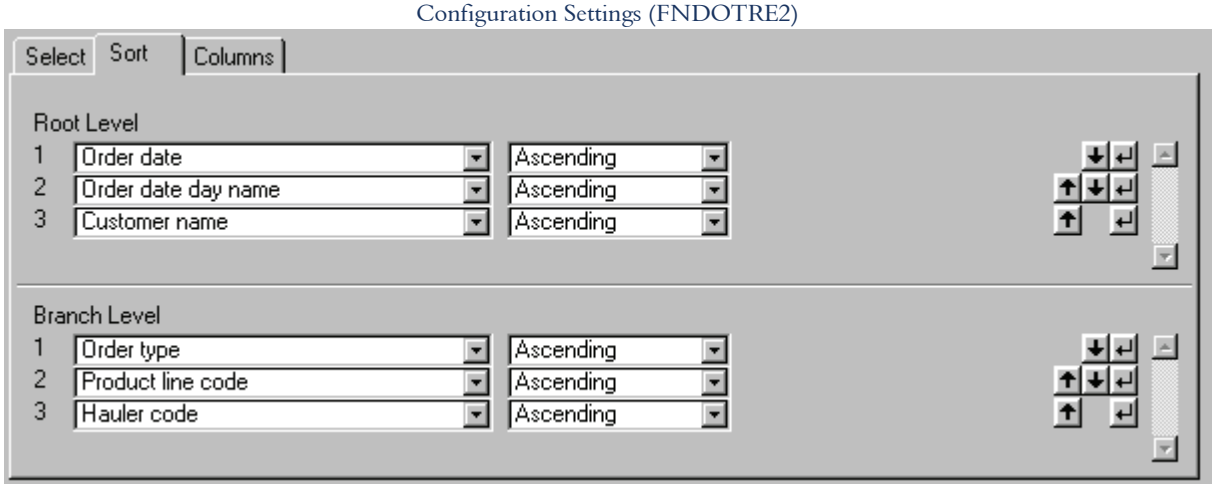
Configuring the Order Tree

Configure the Order Tree using the **Select**, **Sort**, and **Column** tabs on the Configuration Settings screen {File > Select, when the Order Tree is open} to show the information you need. Accept the new configuration. You can have several different Order Tree configurations—all serving different purposes. You might look at one exclusively for orders, and another for tickets. You might want to look at orders by delivery address for shipping purposes, or you might want to sort by delivery method to see all the picked up, or FOB, orders. You also have the option to delete a configuration if necessary. The title bar of the Order Tree screen displays the current configuration in parentheses.

The Root is the primary level of folders you see when **Order Tree** is selected from the Dispatch menu. Choose a sort method for the root level using the Root Level field on the **Sort** tab of the Configuration Settings screen {File > Select, when the Order Tree is open}. For example, if you select **Order Date**, COMMANDseries sorts the orders on the Root level according to their order date, and displays them within those dates accordingly. You can add sort criteria at the root level to fit your specific needs. For example, if your company uses projects extensively, you might sort the Root by **Order Date**, **Customer Name**, and **Project Name**.

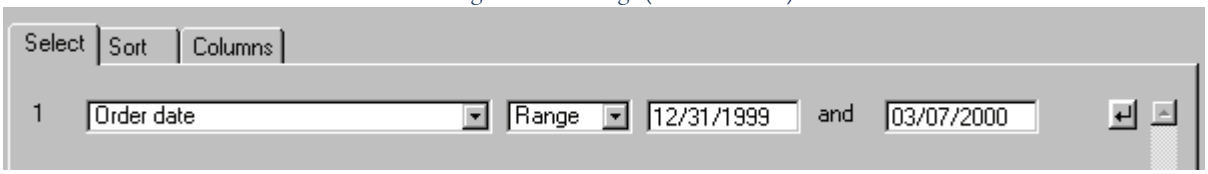
Folders inside the Root folder represent the Branches. The selections you make on the branch level of the Sort tab determine how the orders are displayed on the branch level.

Configuration Settings (FNDOTRE2)



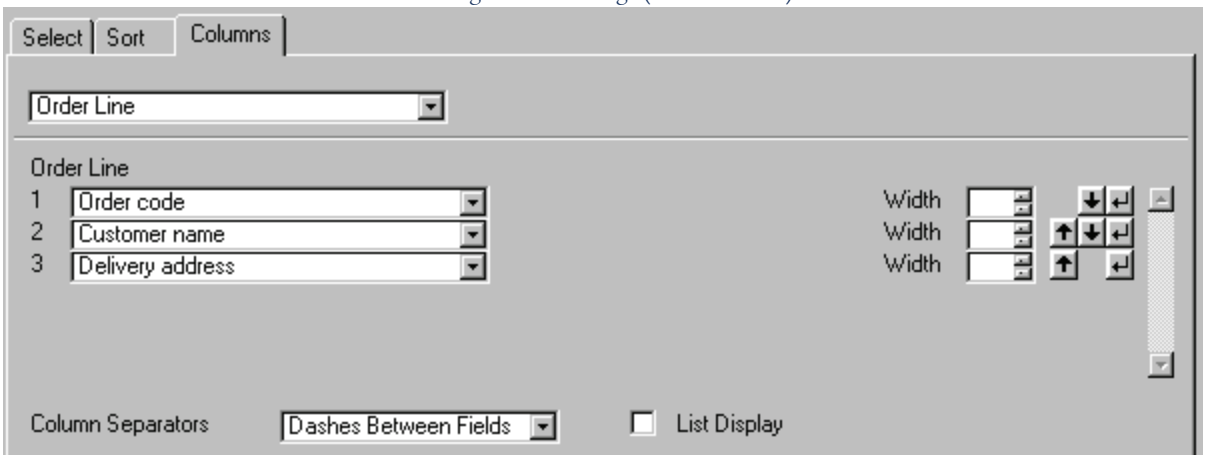
Use the Select tab to further narrow the group of orders displayed in the **Order Tree**. Choose the range of information the Root level information is chosen from. You might choose **Order Date**, **As** or **Between**, and then the dates. While you have the option to look at any range you select, keep in mind that larger ranges require more time to build.

Configuration Settings (FNDOTRE3)



The Columns tab determines how the Order Tree labels the various folders and delivery schedules. There are five different branches of information that appear on the screen below the Order Line; the Root, Order Line, Product Line, Associated Product Line, and Schedule Line.

- When configuring the **Order Line**, it makes sense to make selections like Order Code, Customer Name, and Delivery Address.
- When configuring the **Product Line**, you might choose Product Code, Product Description, Ordered Quantity, and Ordered Quantity unit of measure.
- When configuring the **Schedule Line**, you might choose the Scheduled Plant Code and Scheduled Start Time, or even look at the Distance.



Right-Click Mouse Functionality Using the Order Tree

When using the Order Tree, COMMANDseries features special functionality when you click the right mouse button. Right-clicking while the Order Tree is open will give you the following options:

- **Show Order** - Shows the order screen for the highlighted order.
- **Ticket Order** - Tickets the highlighted order.
- **Help** - Shows the Help Topics screen.
- **Screen Help** - Shows help for the current screen.
- **Clear** - Refreshes the Order Tree display.
- **Select** - Shows the select screen.
- **Sort** - Shows the sort screen.
- **Search** - Repeats the last search. The system searches for information already specified using the Request & Search function. If you click the **Search** button, but have no last search defined, COMMANDseries assumes your doing a Request and Search.
- **Request & Search** - Searches the Order Tree for specified information.
- **Columns** - Shows the columns screen.
- **Menu** - Displays the main menu tool bar.
- **Select Configuration** - Lets you choose a pre-set configuration that is more suitable to present needs.
- **Save Configuration** - Save and name a new configuration.
- **Delete Configuration** - Deletes a configuration.
- **Exit** - Exits the Order Tree.

The Options Menu

When the Order Entry screen is displayed, the Options menu becomes available. Use the Options menu to navigate quickly to commonly used functions in COMMANDseries.

Prefix Screen

Select this menu option to call the Customer-Project-Order Lookup screen.

Switch to Concrete / Aggregate / Block / Asphalt

If you are licensed for both COMMANDconcrete, COMMANDaggregate, and COMMANDasphalt, use these commands to switch from a concrete order form to an aggregate or asphalt order form. For companies that have a concrete plant and an aggregate quarry at the same location, switching order forms is a convenient feature for order takers. Use **Switch to Block** to change the order form to a block order form. This option only works when viewing a completely blank order form. If any order information has been entered, the system will not switch screens.

Test Order Print

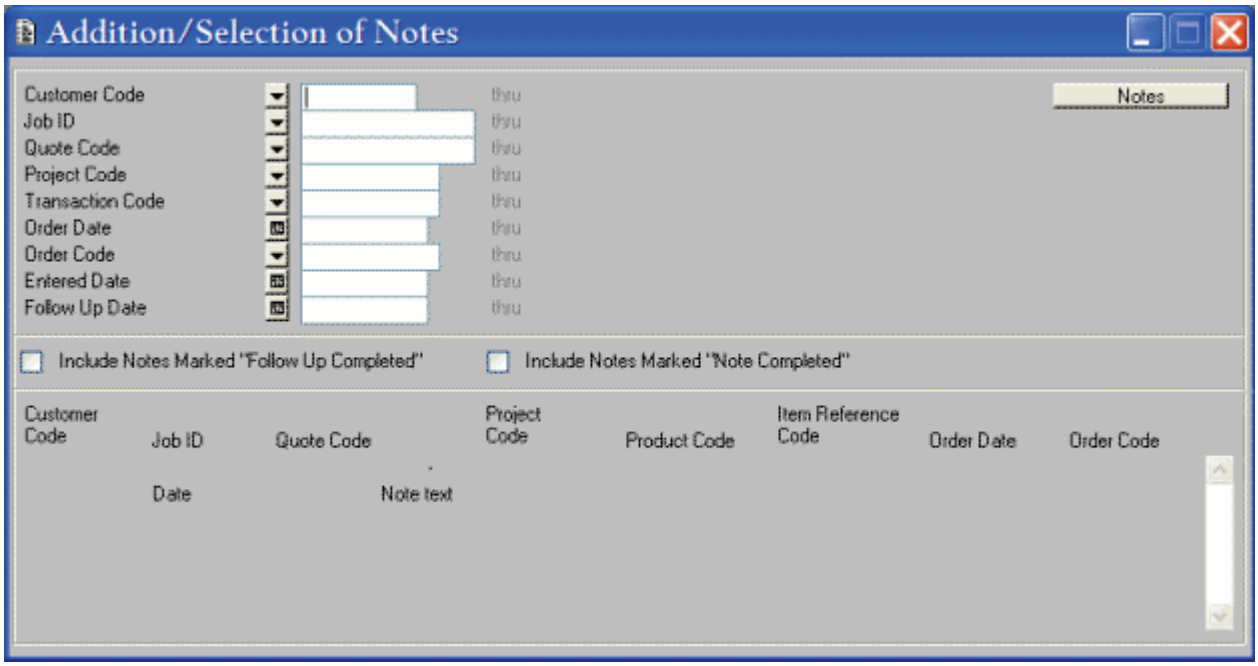
Use the **Test Order Print** option to test print an order. You should test print a single order before printing a series of orders to determine if the information printed correctly, if the print format is correct, and whether or not the order information printed out on the right printer.

Change Order to Metric

Use this feature to switch between metric and US customary.

Addition/Selection of Notes

This option calls the main Addition/Selection of Notes screen.



From this screen you can sort through all customer notes stored in the system. Please see the Customer Notes section for additional information.

Re-Verify Credit Limit

Re-Verify Credit Limit for existing non-delivered current or future orders. The current value of the order will be removed from the calculated Booked but not Shipped Amount of the credit limit and credit check will be done as if the order was a new order.

Current Day orders that have been delivered or past-day orders will not be available for the Re-Verify Check Limit option.

Default Schedule & Pricing Plants in Order Entry

You can establish default hierarchies for loading the Schedule Plant and Pricing Plant in Order Entry.

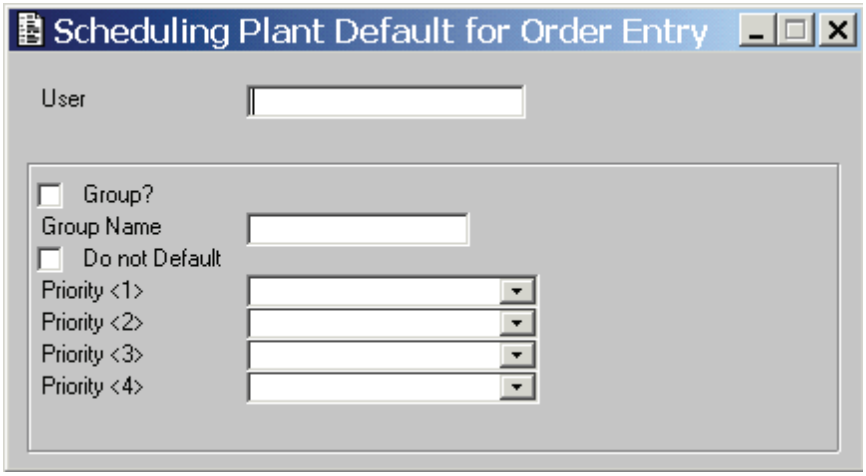
Setup

Two different areas must be configured for this feature:

- User Schedule Plant Default
- {Configuration > Dispatch Tab}

User Schedule Plant Default

A new form, **Schedule Plant Default for Order Entry** (EDTSPDO), has been added to {File > System Information > User Schedule Plant Default}.



This screen lets you establish a default sequence to be used in determining the Scheduling Plant for a new order.

To enter a default sequence:

1. Enter a User ID or a Group ID in the **User** field and press <Tab>. If the user belongs to a group, the Group Name will display. If the entered ID is a Group ID, the **Group?** flag will be checked.
2. If the **Do not Default** checkbox is selected, no schedule plant will default in Order Entry for the selected user/group. The user/group will have to enter the schedule plant manually. Checking this box will also deactivate the **Priority** fields.
3. Select up to four levels of **Priority**. Options are:
   - `User login Plant`
   - `Economic Sourcing`
   - `Customer/Project`
   - `Deliver To` (this option will only be available if **Use Deliver To** is set to `Enable` on the {Configuration > Project/Frame Project tab}.)
4. **Accept** the screen.

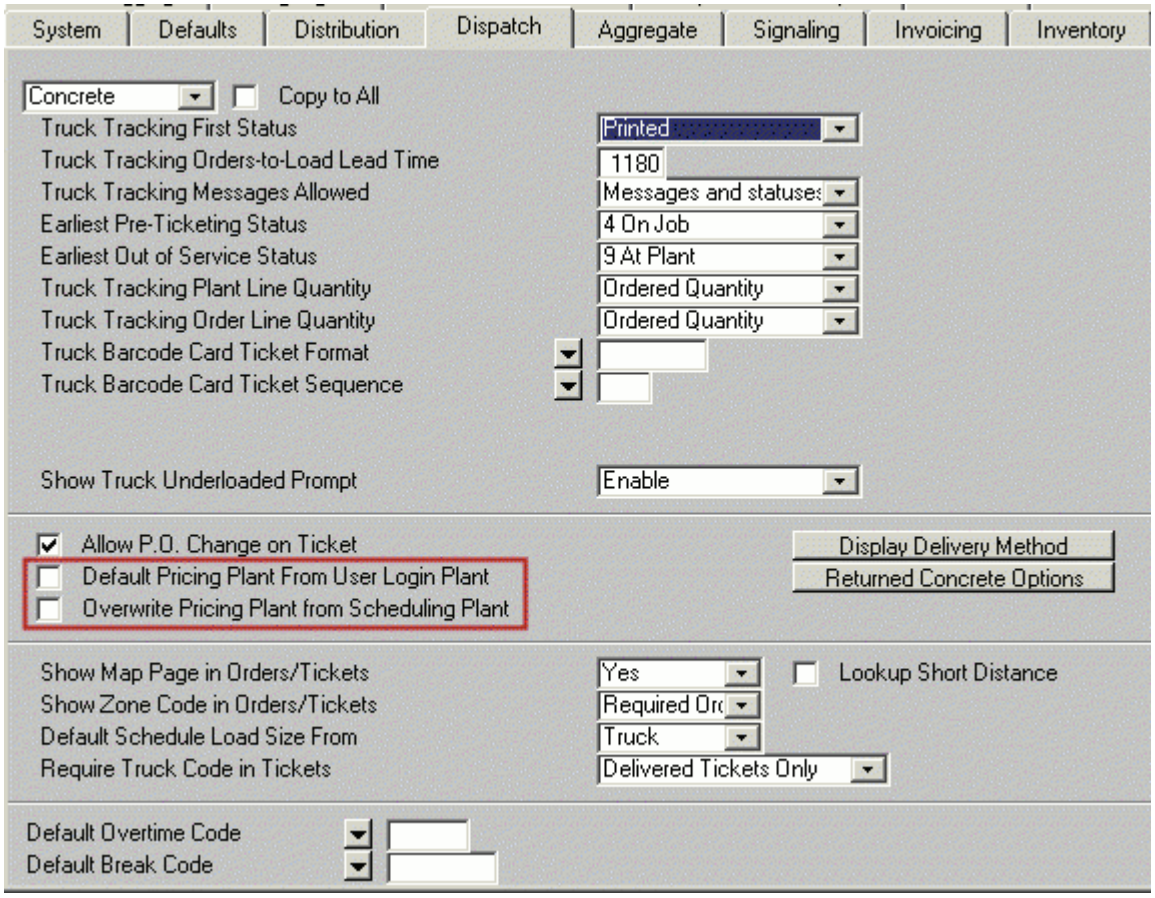
Configuration > Dispatch tab

A number of changes have been made:

- The **Default Pricing Plant from Scheduling Plant** has been renamed **Overwrite Pricing Plant from Scheduling Plant**.
- A new field, **Default Pricing Plant from User Login Plant**, has been added.

These two fields are mutually exclusive; if one is selected, the other is grayed out.

- Various fields have been rearranged to make the tab more accessible.



Workflow

Defaulting Schedule Plant Logic

During Order Entry, the application will test for the appropriate default Schedule Plant as follows:

- If user setup is available in the User Scheduling Plant Default table, it will act based on the flag and priorities as described below.
  - If **User Login Plant** is the top criterion, the Login plant will default into the Scheduling Plant code.

    Economic Sourcing will still be run for the user login plant; however, economic sourcing will not change scheduling plant. You will see the best option based on the cost when you select the economic sourcing button.

    You can change the Scheduling Plant from the Economic Sourcing screen or can edit manually if you have proper privileges.

    If **User Login Plant** is not selected during log in, the application will consider the next priority setup.
  - If **Economic Sourcing** is the top criterion, the application will default the best economic possible/available plant into the scheduling plant as standard. More than

likely, any priorities after economic sourcing will not be valid, because economic sourcing will most likely suggest anything available.

- If **Customer/Project** is the top criterion, the application defaults the scheduling plant from the project if the project is available and the scheduling plant for the product line is not blank. If there is no project, or the Project Scheduling Plant is blank, the application will check the customer record.

  If the project is not available or the scheduling plant in the project is blank, the application will consider the next priority setup.

- If **Deliver To** is the top criterion, the system will check the **Use Deliver To** parameter each time; if it is set as **`Disable`**, the system will ignore the priority and retrieve and use the next priority setup. If it is set to **`Enable`**, and the scheduling plant in the Deliver To is not blank, the system will default the Scheduling Plant in Order Entry. If the scheduling plant is blank in the Deliver To, the application will consider the next priority setup.

- If user setup is not available, the application will check to see if there is any group for the user in the User Name table (**`USNM`**). If there is, the application will check if there is a Group set up in the User Scheduling Plant Default table with **User name: #** and the **Group name**. If there is, the application will process priorities as described above.
- If there is no **Group Name** setup available in the User Scheduling Plant Default table, the application will check to see if there is any set up with **User name:#** and **Group name: `Blank`**. If found, the system will act based on the flag and priorities as described above. If not found, no plant will be defaulted into the pricing plant.

Exceptions

Under certain conditions, the default schedule plant logic will not be used:

- If the new order is a Cash & Carry order. In that case, as standard, the user login plant defaults into the scheduling plant and is not editable.
- A TQS mix is used.
- If the product comes from a project product list and a specified scheduling plant is available.

Under certain conditions, economic sourcing will default the scheduling plant:

- If there is no user setup in User Schedule Plant Default table.
- The user may or may not have group name, but no group name set up related with user in User schedule plant table.
- There is no # setup in User Schedule Plant default table.

If the product is not available in the plant and there is no next priority is setup, the scheduling plant will be left blank.

If the scheduling plant is changed manually, you will be prompted for a reason code. However if the scheduling plant is changed from one priority to another priority, a reason code will not be required.

If **Do Not Default** is selected, the scheduling plant will not default in Order Entry. However, as standard, the order cannot be saved without a scheduling plant; you must enter/select the scheduling plant during Order Entry.

Defaulting Pricing Plant

- If the **Default User Login Plant to Pricing Plant** flag on the {Configuration > Dispatch tab} is selected, the User Login Plant will default as the Pricing Plant on new orders.
- If the User Login Plant is blank, there will be no defaulting. Orders cannot be saved without a pricing plant, so the pricing plant will have to be entered manually.
- If the **Overwrite Pricing Plant from Scheduling Plant** flag on the {Configuration > Dispatch tab} is selected, the order's scheduling plant will be written to the pricing plant.
- If the scheduling plant is changed, the system will overwrite the pricing plant with the new scheduling plant.

Economic Sourcing

Economic Sourcing lets you select the most economical way to fulfill an order. The system calculates the plant with the lowest cost to you and lists all other plant possibilities. Plant selection considers the material cost, distance to the plant (calculated using your map pages), and the cost of delivering the material.

Economic Sourcing can be accessed through the Projects editor and through Order Entry. If you use COMMANDquote, it can also be used with Jobs and Quotes. The Projects editor records a plant that is to be associated with an individual project product. This defaults to the most economical plant choice, as calculated by Economic Sourcing. When accessing through the Projects editor, you can override the default plant for a project product. This will then be used as the default plant on orders associated with that project.

Accessing Economic Sourcing through Order Entry lets you override the default plant on the order with the plant of your choice.

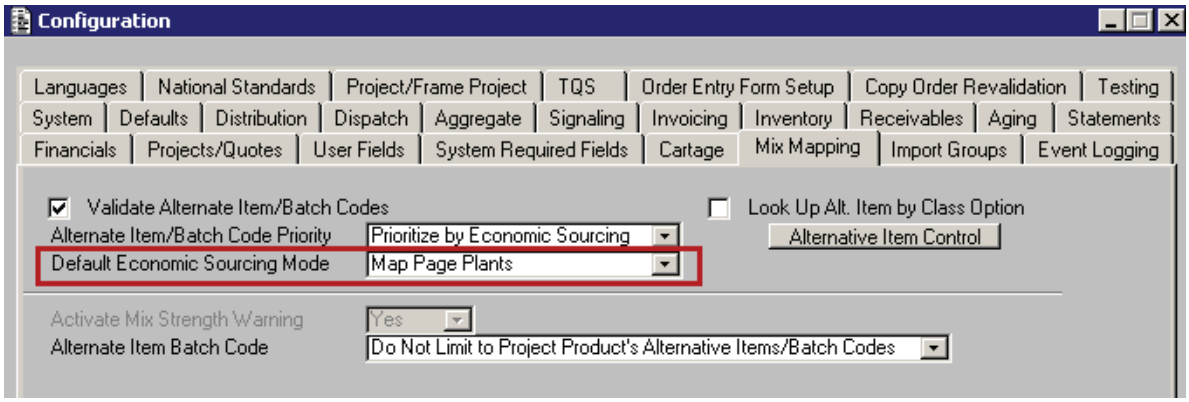
Economic Sourcing will:

- Consider all plants in Economic Sourcing rather than those just with Map Page distance records.
- Provide a detailed breakdown of the cost used in Economic Sourcing.
- Ensure that items with no haulage or material cost are not incorrectly prioritized in Economic sourcing.
- Ensure that Cartage Pay Overrides are included in the Economic Sourcing Calculation.

Using Economic Sourcing

To use Economic Sourcing, go to the Configuration > Mix Mapping tab and select which plants will be used in the intial run of Economic Sourcing in the **Default Economic Sourcing Mode** field:

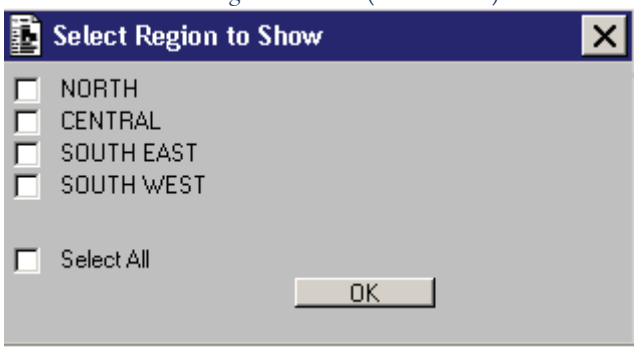
- Map Page Plants
- User Plants
- All Plants



Using Economic Sourcing:

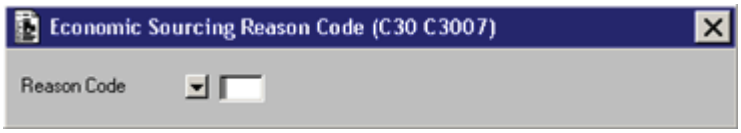
1. To open **Economic Sourcing** for a particular project product (non-TQS mixes only), open the **Products** tab of the **Projects** screen {Files > Customer & Project Information}. Press the **$** button to open the Product Detail Information screen. Go to the **Miscellaneous** tab and press the **£ Economic Sourcing** button. To perform this process for a TQS mix, please refer to the TQS User Guide.
2. To open **Economic Sourcing** while processing an order, press the **£** button in the Scheduling section of the **Order Entry** screen.
3. Initially, the screen displays a list of plants on the map page of the project or order.
4. Choose whether to view only user plants defined for the current user, or all plants. Press the **User Plants** button to display results for the plants defined for the current user. This information is set up in the **Plants** tab of the **Users** screen {Files > System Information > Users > Users > Plants}. If no user plants have been specified, all plants will display.
5. Press the **All Plants** button to open a popup that allows you to select a region. This displays a list of the companies defined in the Company file {Files > General Information > Companies}. Selecting one or more of these options includes only plants for that company /region in the results screen.

Select Region to Show (SELCOMP)



6. Once you have chosen which plants you want to see in the results, the **Economic Sourcing** screen lists the costs for each plant (**Margin**) and the difference in costs between them and the least expensive plant(s) (**Variance**). This screen calculates the margin as Margin = Material Price - (Material Cost + Standard Haulage). It then displays the results in ascending order of margin, i.e. the most economical choice first.
7. To select a plant other than the one that was selected for you, double click anywhere on the line. You will then be prompted to enter a reason code in the **Economic Sourcing Reason Code** screen, to justify this choice.

Economic Sourcing Reason Code (EDTESRC)



8. On the title bar of the screen, you can see, in parentheses, the **Item Code** and **Description** of the mix with which the plant entered will be associated. Enter a reason code or detail on the field to select one from the Reason Codes file.
9. If you accessed Economic Sourcing through Projects, the details will be stored and defaulted into any future order using that project and product. If you accessed Economic Sourcing through Order Entry, when you accept the screen you will return to Order Entry, where your plant choice will show in the **Plant** field. The plant entry will also have been updated in the **Order Lines** file.

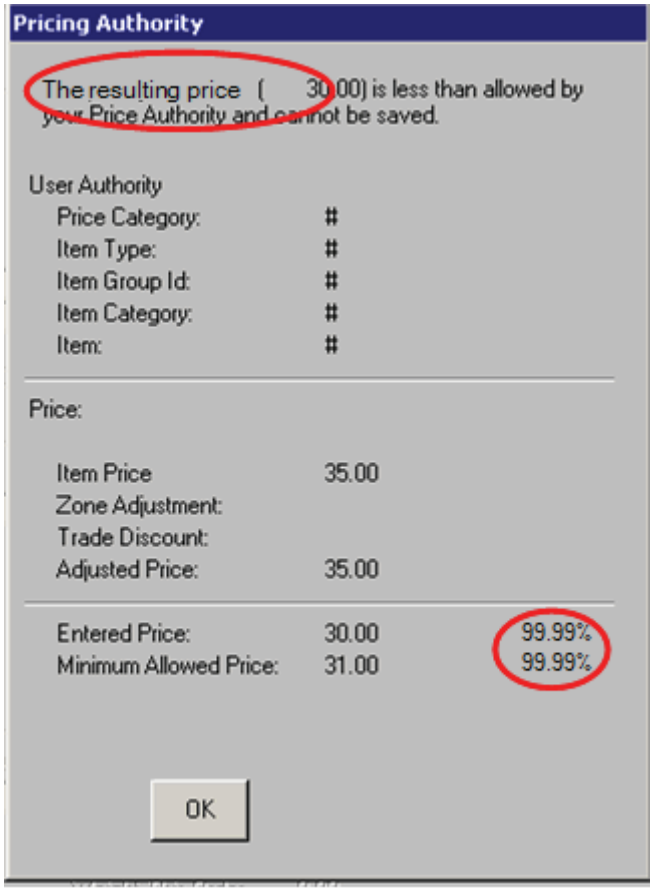
Notes

- The Economic Sourcing editor now displays the Material Cost and Plant Cost information that is used by the Economic Sourcing routine.
- If a Cartage Override Rate exists on the order line, it will be used for the relevant plant in the Economic Sourcing calculation.
- Negative values will not be displayed on the Economic Sourcing form for combinations that are considered incomplete (e.g., a haulage cost cannot be determined).

Pricing Authority - Display Percentage Discount

Currently, when an order taker exceeds the pricing discount authorization set in COMMANDseries, the Pricing Authority form indicates how much the user has exceeded the discount. Since the user typically also needs to see by what percentage discount has been

exceeded, the Pricing Authority form has been updated with two new fields: **Extended Price Percentage** and **Minimum Allowed Price Percentage**.



The Extended Price Percentage displays the amount entered by the user, and the Minimum Allowed Price will display the minimum price (either **`[item price - trade discount]`** or **`[item price - user discount]`**, whichever is less, or **`[item price - trade discount - user discount]`** for users who have the Configuration flag noted below set to **Enable**) that can be given to this customer. Percentages will display next to these numerical values.

- If you have set the **Compute User Price Latitude after Discount** flag to **Enable** on the {Configuration > Projects/Quote tab}, the user discount is computed after the Trade Discount/Zone Adjustment. The entered discount is calculated against the Adjusted Price.
- If you have set the **Compute User Price Latitude after Discount** flag to **Disable**, the user discount is not computed after the Trade Discount/Zone Adjustment. The entered discount is calculated against the Item Price.

Email Notifications

The email notification system used in conjunction with Pricing Authority/Discount Levels uses a Uniface component to send emails. These emails can only be sent within the company system. Implementing this new system involves the following changes:

- The **\Bin\Message Delivery** folder is no longer needed and can be removed.

- The EMLG database table will serve as an email log.
- Two fields should be completed on the Configuration > Defaults tab:
  - **E-mail Host** - Identifies the email host.
  - **Email from Address** - Defines the address to be used in the From field on all notification emails.

The assignment file must be updated so that COMMANDseries can access a required .NET DLL. The ASN Wizard will automatically add the line **..\bin\uauthlogin.dll** to the **[USER_3GL]** section. If the system is configured for email notification and this line is not in place, when COMMANDseries starts, it will prompt you to have your administrator run the ASN Wizard.

Transport Pricing

In many European countries, it is required by law to record and print the unit price and total price for any product and service at the product line level on pro forma invoices. Previously, COMMANDseries was unable to support calculation of transport and other services rendered when no concrete is produced (such as Pump Relocation) when distance was a variable in the price. Now, COMMANDseries can define such an item and price it using a Cartage Rate Table, which will price the item properly in Order Entry when the order schedule is entered and the distance is defined.

- Discounts on Cash orders will apply to transport line-items just like they do for any other kind of order line-item. The Item Code, Description, Price, and Extended price will display on the Proforma invoice.
- Prices for distance-based items can be modified until the order is shipped by changing the distance on the schedule.
- Prices are based on the scheduled distance on the order, and will not change if a ticket is created from an alternative plant that has a different distance.
- Cartage Rate Tables are assigned to items based on the location, so an item can have varying rates if it is priced from different locations.
- Cartage Rate Tables should be created specifically for transport items since pricing for these items is determined differently from regular items. You should not use the Cartage Rate Tables that may have already been created to add cartage charges.

New Fields

Several new fields have been added to forms in COMMANDseries to accommodate this enhancement.

Items Editor

The Items > Prices tab contains a new **Cartage Rate Table** field, which is represented as **CART_CODE** in the IPRC (Item Price) table. Enter the Cartage Rate Table code that you wish to have associated with the transfer item in this field. Only Cartage Rate Tables that

have a Rate Type of **Quantity/Distance** or **Plant/Zone** can be entered in this field. The Cartage Type must be either **Charge** or **Both (Payment and Charge)**.

If you manually enter a price for the item in this field, the **Cartage Rate Table** field will become void and you will not be able to assign a Cartage Rate Table to this item.

Order Entry and Ticketing

A new field, **BALANCE_ON_LAST_LOAD**, has been added to the ORDL (Order Product) table. This field will display as **Collect Balance on Last Load** on the Product Descriptions form in Order Entry and Concrete Ticketing and Shipping. You will only be prompted for this field when the **Load Qty** is changed from the **Order Qty** default.

In Ticketing, when the **BALANCE_ON_LAST_LOAD** field is **Yes**, the Undelivered Quantity that remains when the last load is scheduled is ticketed.

System Logic

Pricing Logic

- When the item's location Price Cartage Code is populated with the Cartage Rate Type of Quantity/Distance, the price will be taken from the Cartage Range table (CTRG).
- When the item's location Price Cartage Code is populated with the Cartage Rate Type of Plant/Zone the price will be taken from the Cartage Plant Zone table (CTZN).
- When the item' location Price Cartage Code is NOT populated, the price will come from the Item Location Price table (IPRC).

Order Entry Logic

- When the schedule information has been completely filled out, the system will identify products where the Item Price field **CART_CODE** is populated for the appropriate schedule plant location and customer/project price category.
- When the Cartage Code field is populated, the order lines will be repriced after the completion of the schedule, using the procedure in the Pricing section above.

Edit Orders & Tickets and Update Costs & Prices Logic

- If a schedule exists, the system will determine which items are transport items (those that have a Cartage Code for pricing). Items will be repriced using the procedure in the Pricing section above.
- If a schedule does not exist, items will be repriced as usual from the IPRC table, which will return a zero price.

Journeys

A journey is a feature of COMMANDseries that allows you to schedule a truck to make one trip with several stops and one product. This typically happens when several customers require a small quantity of an identical product.

Topics in this section:

Creating a New Journey
Editing an Existing Journey
Ticketing a Journey

Creating a New Journey

The **Journey** screen allows you to create journeys in advance to allow you to plan deliveries ahead of time. Typically journeys are created the day prior to delivery using multiple orders placed for that day.

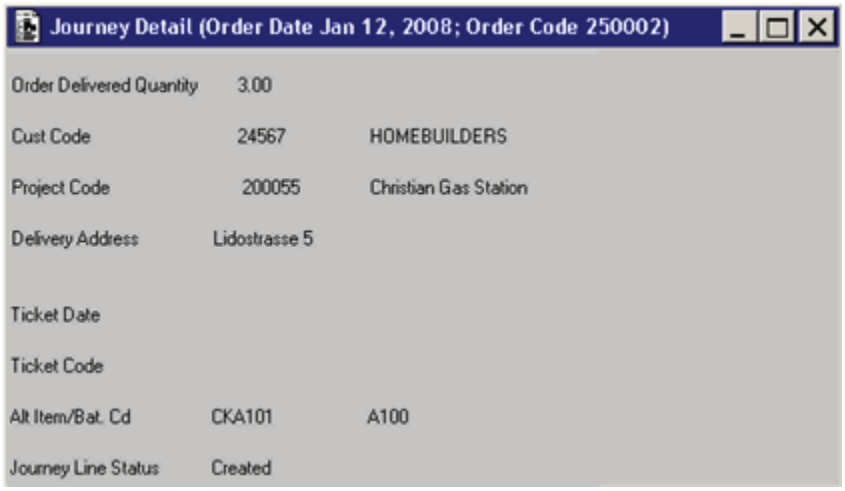
To create a journey:

1. Open the **Journey** Editor {Dispatch > Journey Editor}.
2. Enter the **Journey Date**. Typically this will be tomorrow's date.
3. Enter the **Plant Code** from which the order will be shipped.
4. Tab through the **Journey Code** field to allow the system to auto-assign a value, or enter a custom journey code.
5. The **Truck Code** field is optional, but can be completed if necessary.
6. Enter the **Order Date** of the orders you wish to add to the journey. If you tab through the field, it will default to the current date.
7. Detail on the **Order Code** field and select an order to add to the journey. By default, the list displays orders scheduled from the plant selected in step 3. A different plant can be manually selected if required.
8. The **Journey Status**, displayed at the bottom of the screen, now displays as `Created`. The journey status messages that you may see here are as follows:
   - **Created** - The journey has been created but not ticketed.
   - **Ticketed** - The journey has been created and ticketed.
   - **Removed** - The journey has been cancelled.
   - **Added during Shipping** - The journey was created at the time of ticketing rather than through the Journey Editor.
9. If there is more than one product on the order, the **Item Code** field becomes active. Select the item that you wish to include in the journey. If the order you selected contained only one item, the order date, order code, and item code fields are greyed out and read-only. The **Load Quantity** and **Sequence** fields then become active.
10. Enter any **Sequence** information as necessary. The entries must be sequential numbers between one and the number of stops on the journey. The number represents the order in which the stops of the journey will take place. Accepting the Journey screen with no sequence entries causes the sequence to be saved in the order that the stops were added.

Journey screen (EDTJOUR)

11. The detail button to the right of the sequence field opens the **Journey Detail** screen, which provides additional journey information.

Journey Detail (EDTJOUR0)


Journey Detail (Order Date Jan 12, 2008; Order Code 250002)
Order Delivered Quantity 3.00
Cust Code 24567 HOMEBUILDERS
Project Code 200055 Christian Gas Station
Delivery Address Lidostrasse 5
Ticket Date
Ticket Code
Alt Item/Bat. Cd CKA101 A100
Journey Line Status Created

12. Notice that the **Journey Line Status** displayed at the bottom of the screen now displays as **`Created`**. The journey status messages that you may see here are:
    - **Created** - A journey stop has been created but not ticketed.
    - **Ticketed** - A journey stop has been created and ticketed.
    - **Removed** - An existing journey stop was removed at the time of ticketing.
    - **Added and Ticketed** - A new journey stop was added at the time of ticketing.
13. To add another order to the journey, tab through or hit <F6> and repeat steps 7-10. The order that you select from the list must contain an identical product to the first. If you select an order with a different product, you will receive the following message: "**`Can't add different mix products on the same Journey`**." You will then be able to select a different order. Repeat this process until all the necessary orders have been added to your journey.
14. **Accept** the journey.

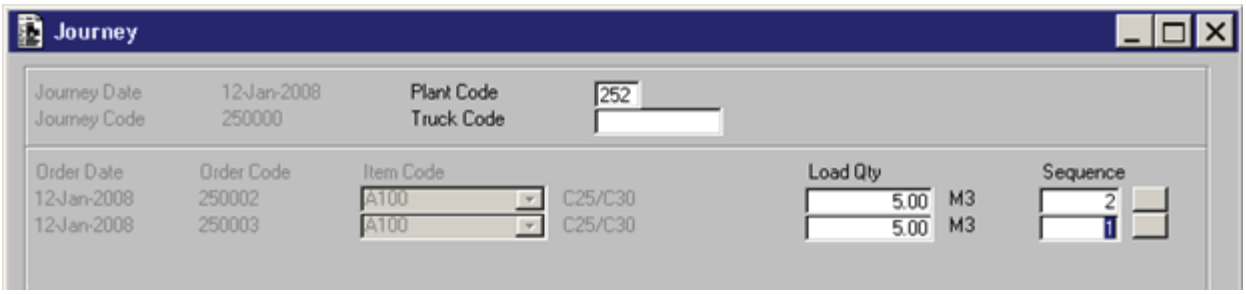
Editing an Existing Journey

Once a journey has been created, it may be necessary to re-order, add or remove orders.

To edit a journey:

1. Open the **Journey Editor** {Dispatch > Journey Editor}.
2. Enter the **Journey Date** and the **Plant Code** from which the order is to be shipped.
3. Detail on the **Journey Code** field and select a journey.

Journey screen (EDTJOUR) - Edit journey sequence



4. The screen is populated with journey information. You can now edit the **Load Quantity** and **Sequence** entries as required.
5. You can also add new stops/orders to the journey by tabbing onto the next line, or pressing <F6>.
6. **Accept** the changes.

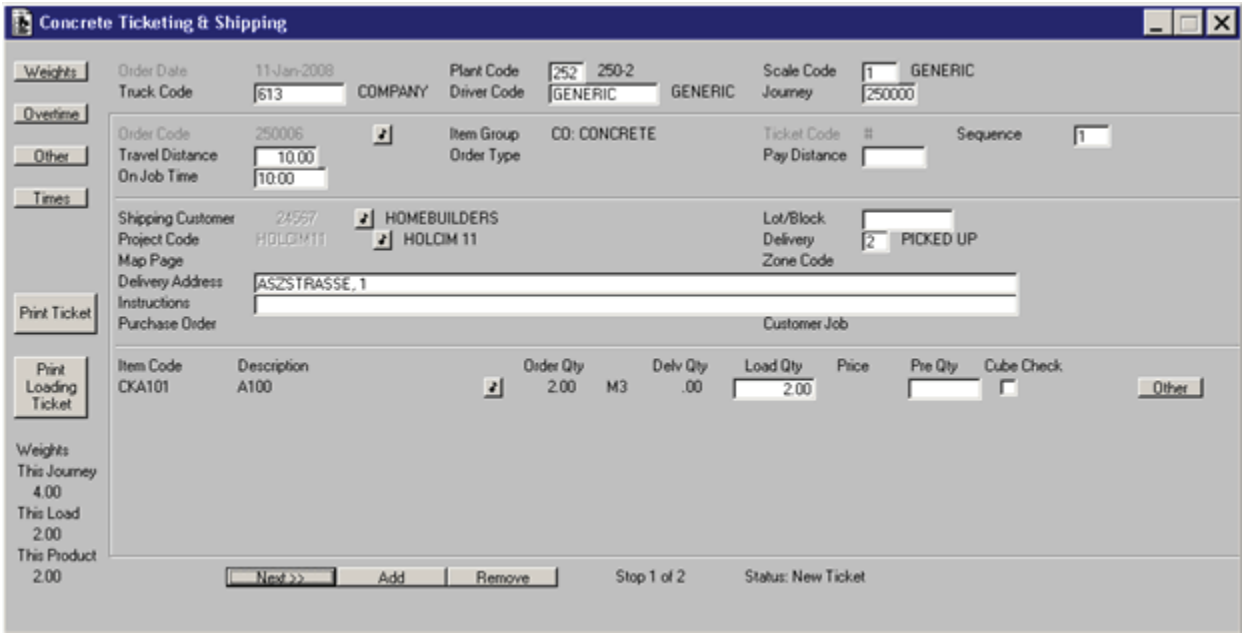
Ticketing a Journey

Once you have created a journey, you must ticket each of the orders on that journey. COMMANDseries provides a convenient way to do this all at once.

To ticket a journey:

1. Open the **Concrete Ticketing & Shipping** screen {Dispatch > Concrete Ticketing & Shipping}.
2. The **Order Date** defaults to the current date. If necessary you can change this once the plant code field has been completed.
3. Enter the **Plant Code**, **Truck Code** and **Driver Code** as necessary.

   If a truck code was entered on the **Journey Editor**, it is not necessary for the truck code in this screen to match.
4. Detail on the **Journey** field and select a journey from the list. By default, the list contains only journeys planned for the present date.
5. You will now see each stop in the journey automatically loaded into the ticketing screen. You can navigate through the tickets using the **Next** and **Previous** buttons.



6. To add a stop/order to the journey at this point, press the **Add** button. This adds an occurrence to the screen and allows you to select an **Order Code** to add to the journey. Tab through the **Ticket Code** field to create the new ticket. You can also remove any stops that are not required by navigating it and pressing the **Remove** button.
7. **Accept** the screen. The journey stops are ticketed and the journey is updated with any changes made to its stops and/or sequence.

Once a journey has been ticketed changes can no longer be made. One ticket instruction is sent to the batch panel for all individual journey tickets.

If you view the details of a completed journey in the **Journey Editor**, pressing the detail button opens the **Journey Details** screen and lets you view the completed journey information.

Multi-Drop Concrete Deliveries

Overview

Order Entry has been modified to accommodate multiple drops for Concrete Products. This enhancement applies only to users who have Concrete Products (**CB**) in their system license.

Plants Editor

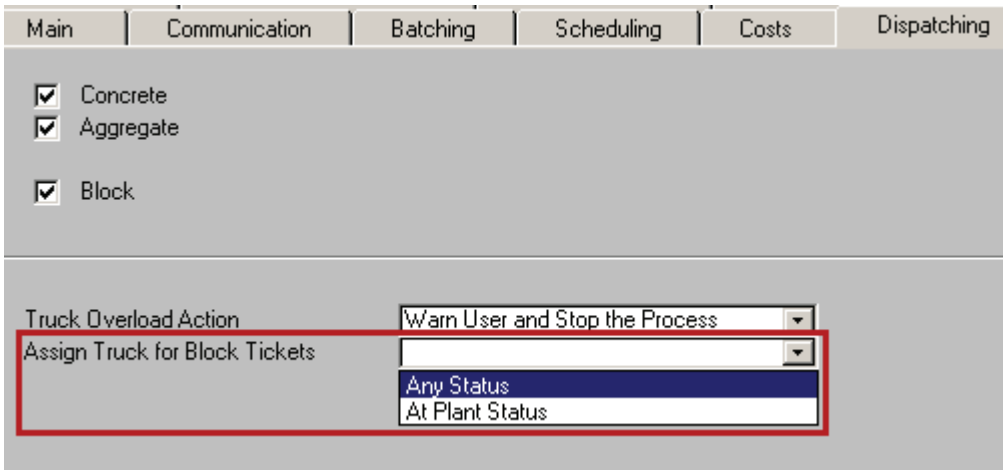
The following changes have been made to the Plants editor:

- The Plant tab has been renamed Dispatching.
- An **Assign Truck for Block Ticketing** field has been added to the Dispatching tab with the below options:

- **Any Status** - You have the ability to assign a truck, regardless of the truck's current status.
- **At Plant Status** - Default. You can only assign trucks that are currently in an At Plant status.

This field is valid only for Block tickets.

Plants > Dispatching tab (EDTPLNTF)



Order Entry

Below is the process flow for ordering with Concrete Products:

- Order lookup is now based on item groups, as opposed to the application module.
- The **Load Quantity** will not display on the Schedule line if the item type is set to Concrete Products (**CB**).
- If the order is for a Concrete Product, the **Loads** field will default to **1**. All quantities will then be defaulted to the first load on the Scheduling form. You can change this if needed.
- If the **Loads** field is updated to an amount other than **1**, loads in the Scheduling form will be modified by dividing the quantities with the number of loads.
- When the total load quantity does not match the order quantity, you will receive an error message with the following options:
  - **Adjust Order Quantity** - The order quantity will be adjusted based on the total scheduled quantity of the product.
  - **Adjust Scheduled Quantity** - The scheduled quantity will be adjusted, beginning with the first load all the way to the last load.
  - **Cancel** - Return to the order.
- **Apply Minimum Load Charges** and **Zone Charges** are not editable on the Order Entry Pricing screen.

Ticketing

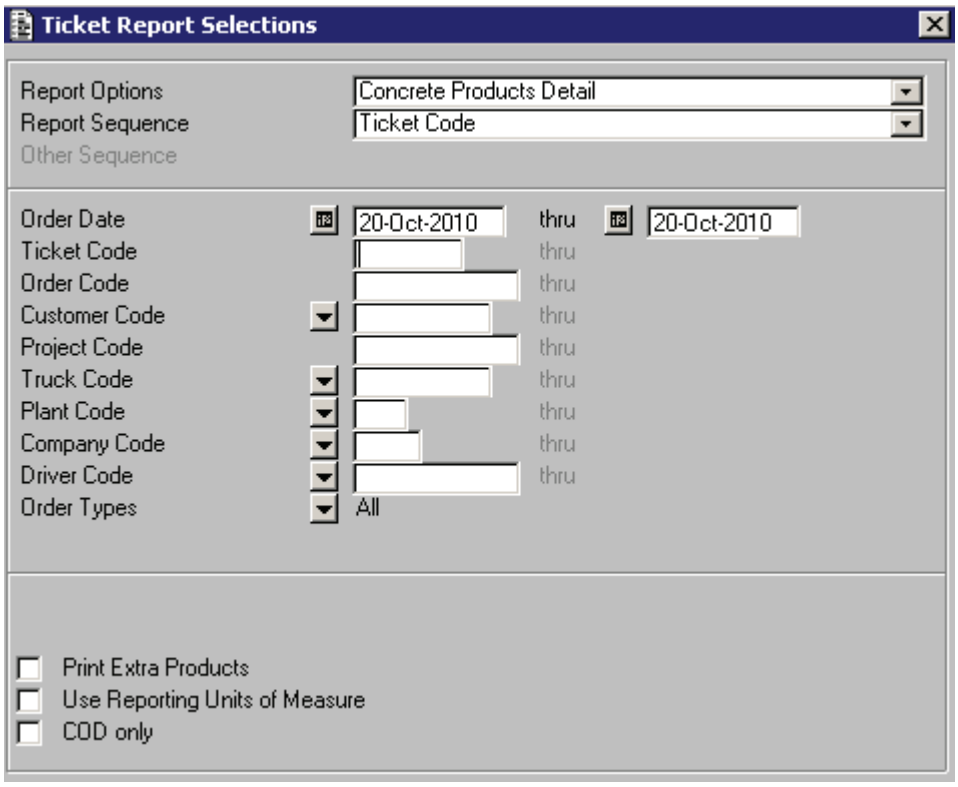
Below is the logic for ticketing with Concrete Products:

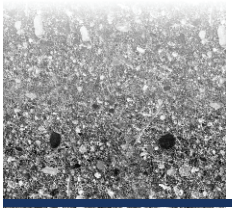
- The **Pre-Quantity** and **Cube Check** fields will not display for Concrete Product orders.
- When a loading ticket is printed, all quantities related to that ticket will be recalculated since the quantity may have changed after actual loading has been completed. Inventory files will also be updated with these quantities.
- The delivered quantity is subtracted from the order quantity; the next load quantities are then compared with the remaining quantity.
  - If the remaining quantity is greater than or equal to the load quantity, the load quantity defaults to ticketing.
  - If the remaining quantity is not greater than or equal to the load quantity, and it is not negative or blank, the subtracted value defaults to the load quantity in ticketing.
- When a ticket is created with quantities other than the scheduled quantities (i.e., the quantity is manually changed), the system will adjust the remaining scheduled quantities in one of the following ways:
  - The product's last schedule will be adjusted if the ticket is not the product's last schedule.
  - When the ticketing process comes to the last schedule, another schedule will be added with any remaining quantity.
  - If the quantity delivered is more than the scheduled quantity, the system will adjust the last schedule to follow the previous schedule's until the quantity is adjusted appropriately.
  - The schedule line will be removed when the schedule does not have any quantity for the order because of the delivered quantity adjustment.
  - When a new product is added after the order has been saved, you will be allowed to update the schedule manually. If you do not schedule the full quantity, you will receive an error message and will not be allowed to save the screen.
- When the ticket quantity is different from the schedule loads quantity, the system will adjust the schedule loads based on the scheduled quantity for the order line.

Ticket Report

The Ticket Report Selections screen {Dispatch > Dispatching Reports > Ticket Report} has been updated with a new option, Concrete Products Detail, which you can run to see information for these deliveries.

Ticket Report Selections screen (SELTICK)





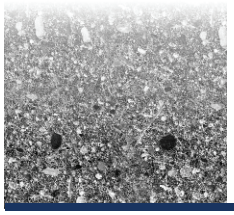
Aggregates Sold Through Ready-Mix Plant

Several companies sell blended aggregates through a ready-mix plant. These blended aggregates are set up, ordered, ticketed, batched, and delivered as though they were concrete mixes. However, since pricing information is often imported from other applications in tons, not in cubic meters as would normally be required for a concrete mix, these applications expect ticket price quantities to be returned in tons as well. Presently, COMMANDseries does not support price quantities in tons for concrete items.

- COMMANDseries can support the import and export of prices in tons for blended aggregates that have been set up as concrete mixes with an Item Type of Concrete.
- Item prices and project product prices are converted to cubic meters for the Data In routine {Manage > Data Management > Import Data}.
- Price quantities are converted to tons when printed or exported during Ticketing and the Data Out routine {Manage > Data Management > Export Data}.
- The "Item Units of Measure" Master File Data In {Files > Master File Data In} process updates item prices and project product prices for price records that were imported when no UOMI (Item Units of Measure) record existed.
- All conversions from and to cubic meters or tons are based on the conversion factors stored in the item's UOMI record.

The following Document Tags have been created:

- **PPPCNV** - Project Product Price Conversion Tag (Document Type: Project Data In/Out)
- **TKQCNV** - Ticket Quantity Conversion Tag (Document Type: Ticket Print And Data In/Out)
- **UOMISO** - UOM ISO Code Tag (Document Type: Ticket Print And Data In/Out)
- **PRPCNV** - Previous Price Conversion Tag (Document Type: Item Data In/Out)
- **IMPCNV** - Item Master Price Conversion Tag (Document Type: Item Data In/Out)



Sampling & Testing Plan

Sampling and testing plan functionality allows the user to enter basic testing frequency parameters. Based on those parameters, COMMANDseries will notify the user that the concrete being produced needs to be sampled and tested.

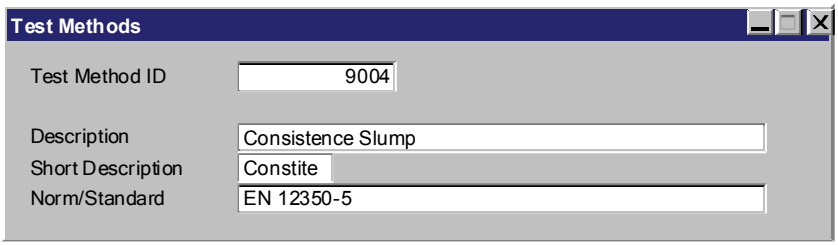
Note: To use sampling and testing, you must have Concrete Testing Database (CS) in your system license.

Configuration

Test Methods

A new form, **Test Methods** (Files > Item Information > Test Methods), is used to store basic test method information. This data will be stored in the new Testing Methods (TSME) table.

Test Methods screen



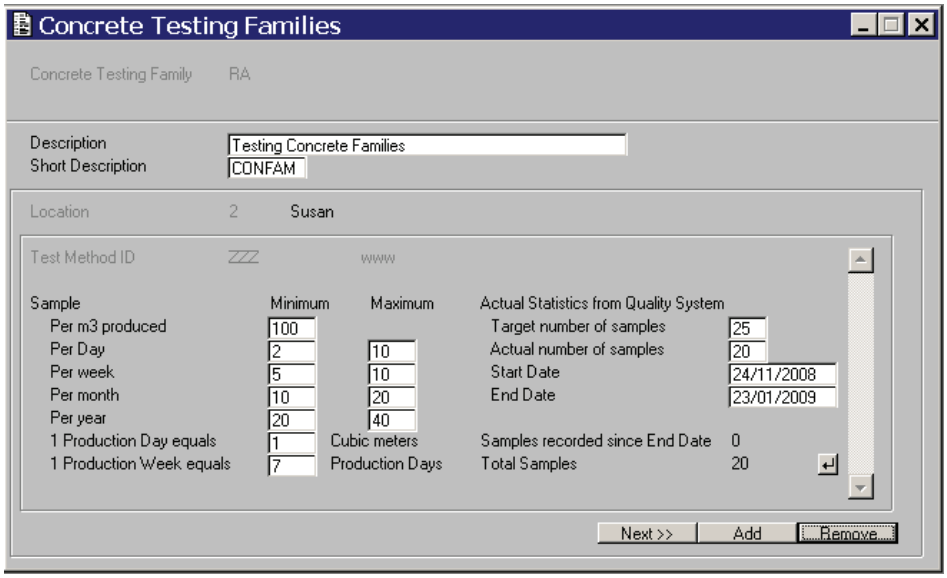
- **Test Method ID** –This unique identification code will be used on other fields to assign a given testing method to a mix or concrete family.
- **Description / Short Description** – Standard descriptions.
- **Norm/Standard** – This field identifies fact sheet or publication that specifies the criteria to be used for this test. It is provided for reference purposes only.

Field-level security can be applied to all fields on this form.

Concrete Testing Families

A Concrete Family is a collection of mixes that are grouped together for testing purposes. When a testing plan calls for a test of Family A, any mix in Family A is eligible for the test. You can organize your families however you wish: by strength, by cement, type, etc. This data is stored in the Testing Families (TSTF) table and its child tables, Testing Families Location (TSTL) and Testing Families Testing Methods (TSTM). The TSTF table is itself a child table of the Locations (ILOC) table.

Concrete Testing Families screen



- **Concrete Testing Family** – Code used to identify the testing record.
- **Description / Short Description** – Standard descriptions.
- **Location** – Testing parameters are assigned by COMMANDseries location.
- **Test Method ID** – The Test Method ID code to be used for this family/location. Detail on the field to select from a list.
- **Sample** parameters – These parameters determine the conditions under which a sample may be requested. If the sample logic executes and the actual number of samples taken exceeds the maximum for all parameters, the system won't request a sample.
- **Statistics** – Statistical information can be hand-entered or uploaded from the Fire-Q system.

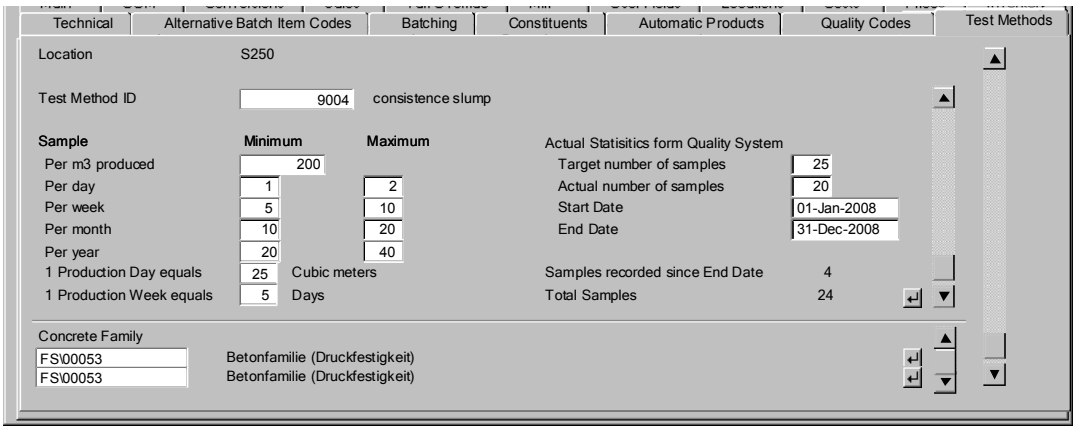
Field-level security can be applied to all fields on this form.

Note: Multi-language support is provided for the Description and Short Description fields for both testing methods and testing families. If your system is configured to support multiple languages, those field will be stored in the **TSME_LNG** and **TSTF_LNG** subtables and retrieved as needed.

Item-Testing Methods

A new tab, Test Methods, has been added to the Items editor. This tab will display only for mix items:

Items-Test Methods tab



You can assign multiple test methods for multiple locations. In addition, you can also assign the mix to multiple Concrete Testing Families. If any family is assigned to an item, the test methods of the family dictate sampling and testing rules; test methods assigned directly to the item will be ignored.

Users

The Users > Options tab has a new field, **Display Test Message in Order Entry**. If this option is enabled, then notification that test samples need to be taken will display during order entry. Those notifications can then be entered as dispatch memos, if necessary.

Selection Logic

The method for determining whether a test(s) is to be performed will be governed by:

- The Production Volume since the last test requirement was satisfied.
- The Target Volume for the Testing Method.
- The Maximum Tests per Calendar Year, Calendar Month, per Calendar/ Production Week, and per Calendar/ Production Day (if the max per month has been met, no other lower level checks are necessary; likewise per week and per day.)
- Productions Days and Weeks will have to be identified as a day that the Concrete Code or a member of the Family was, in fact, produced at a certain minimum level of m3.

Definitions

- Production Day
  - If Null or Zero (0), a Production Day is considered to be a Calendar Day.
  - If Not Null or greater than Zero (0), a Production Day is considered only when the Actual Production Volume is greater than or equal to the value entered.
- Production Week
  - If Null or Zero (0), a Production Week is considered to be five Calendar Days.
  - If Not Null or greater than Zero (0), a Production Week is considered to be five Production Days.

Once the Maximum checks are performed, the Minimum per Day, Per Production Week, per Calendar Month, and per Calendar Year are checked. Whenever a test is required to meet a Maximum, or Minimum testing requirement, messages will be generated in Orders (if applicable) and in Concrete Ticketing.

Operational Logic

When a schedule (**not** an order) is saved, the system will perform the test sample selection logic on any mix on the order:

- Identify the Item Code and Location Code for the order or ticket.
  - If the Item Code at the Location has ANY Concrete Families assigned, all Testing Methods for the Concrete Family / Location will be used.
  - If NO Concrete Families are assigned, all Testing Methods for the Concrete Item Code at the Location will be used.

For each Testing Method, the Start Date and End Date are supplied by FIRE Q, and define the date range for the Target Number of Samples and Actual Number of Samples. The Actual Number of Samples will be those that were ACTUALLY performed and reported back through the FIRE Q system. All queries to CS Tickets for the Samples recorded in CS will be back to the End Date supplied by FIRE Q.

- Maximum - Per Year
  - Retrieve tickets (for the Item or Family) for the calendar year.
  - Determine number of samples recorded.
  - If the Maximum Samples Per Year has been met, exit routine - No Sample Needed.
  - If the Maximum Samples Per Year is Null or Zero, proceed to next step.
- Maximum - Per Month
  - Retrieve tickets (for the Item or Family) for the calendar month.
  - Determine number of Samples recorded.
  - If the Maximum Samples Per Month has been met, exit routine - No Sample Needed.
- Maximum - Per Week
  - Retrieve Tickets (for the Item or Family) for the Week (based on 1 Production Week Equals x days).
  - Determine number of Samples recorded.
  - If the Samples Per Week - Maximum has been met, exit routine - No Sample Needed.
- Maximum - Per Day
  - Retrieve Tickets (for the Concrete Item or Family) for the Day (based on 1 Production Day Equals x m3).
  - Determine number of Samples recorded.
  - If the Maximum Samples Per Day has been met, exit routine - No Sample Needed.
- Minimum - Per Day
  - Retrieve Tickets (for the Concrete Item or Family) for the Day (based on 1 Production Day Equals x m3).

- Determine Quantity Produced and number of Samples recorded.
- If the Minimum Samples Per Day has not been met, request a sample.
- If the Minimum Samples Per Day has been met; that is, if (Actual Production Volume / Number of Samples Taken for the Day) < Sample per m3 Produced, request a sample.

- Minimum - Per Week
  - Retrieve Tickets (for the Concrete Item or Family) for the Week (based on 1 Production Week Equals x days).
  - Determine Quantity Produced and number of Samples recorded
  - If the Minimum Samples Per Week has not been met, request a sample.
  - If the Minimum Samples Per Week has been met–that is, if (Actual Production Volume / Number of Samples Taken for the Week) < Sample per m3 Produced, request a sample.
- Minimum - Per Month
  - Retrieve Tickets (for the Concrete Item or Family) for the Calendar Month.
  - Determine Quantity Produced and number of Samples recorded.
  - If the Minimum Samples Per Month has not been met, request a sample.
  - If the Minimum Samples Per Month has been met; that is, if (Actual Production Volume / Number of Samples Taken for the Month) < Sample per m3 Produced, request a sample.
- Minimum - Per Year
  - Retrieve Tickets (for the Concrete Item or Family) for the Calendar Year
  - Determine Quantity Produced and number of Samples recorded
  - If the Samples Per Year - Minimum has not been met, request a sample.
  - If the Samples Per Year - Minimum has been met; that is; if (Actual Production Volume / Number of Samples Taken for the Year) < Sample per m3 Produced, request a sample.

Operations

Importing Test Plans

The Master File Data In routine supports the following import types:

- Testing Methods
- Testing Methods - Translations
- Testing Families
- Testing Families - Translations
- Testing Families Methods
- Item Location Testing Methods
- Item Location Testing Families

Document tags for the import process will have to be created manually. Below is a table listing the fields that will most likely be needed for standard import and export routines:

Standard import fields

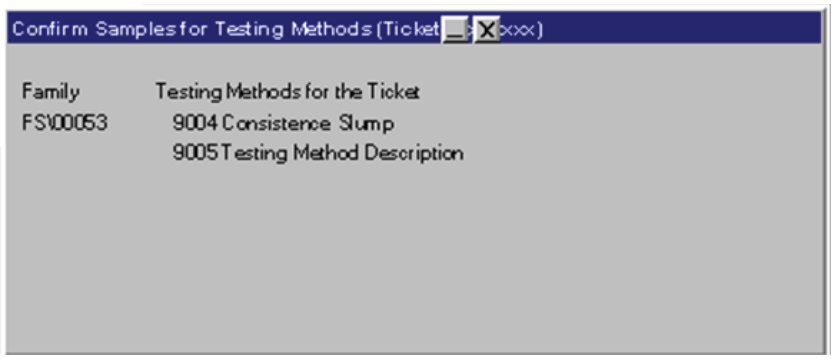
Item Code (ILTF)
Location Code (ILTF)
Test Family Code (ILTF)
Actual Samples (ILTS)
End Date (ILTS)
Item Code (ILTS)
Location Code (ILTS)
min sample production volume (ILTS)
min samples per day (ILTS)
min samples per month (ILTS)
min samples per week (ILTS)
min samples per year (ILTS)
max samples per day (ILTS)
max samples per month (ILTS)
max samples per week (ILTS)
max samples per year (ILTS)
production day value (ILTS)
production week value (ILTS)
Start Date (ILTS)
target samples (ILTS)
Test Method Code (ILTS)
description (TSME_LNG)
Language Code (TSME_LNG)
Norm Standard (TSME)
Short Description (TSME_LNG)
Test Method Code (TSME_LNG)
Test Method Short Description (TSME)
Test Method Description (TSME)
Test Method (TSME)
Test Family Description (TSTF_LNG)
Test Family Language Code (TSTF_LNG)
Test Family Short Description (TSTF_LN(
Test Family Ocde (TSTF_LNG)
Test Family Description (TSTF)
Test Family Short Description (TSTF)
Testing Family (TSTF)
Actual Saample (TSTM)
End Date (TSTM)
Location Code (TSTM)
min samples per day (TSTM)
min samples per month (TSTM)
Min Sample prod per vol (TSTM)
min samples per week (TSTM)
min samples per year (TSTM)
max samples per day (TSTM)
max samples per month (TSTM)
max samples per week (TSTM)
max samples per year (TSTM)
production day value (TSTM)
production week value (TSTM)
Start Date (TSTM)
Test Method Code (TSTM)
Target Sample (TSTM)
Test Family Code (TSTM)

Order Entry & Ticketing

Order Entry

When you have the **Display Test Message in Order Entry** field enabled on the User > Options tab, the system will display the following message if a sample needs to be taken:

Order Entry Sample Notification



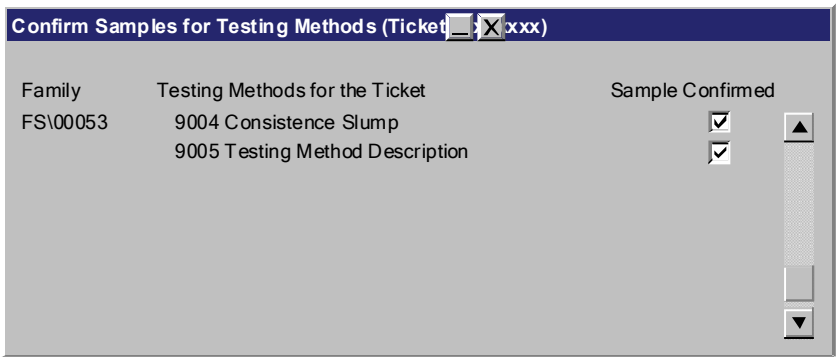
Depending on the mix and various defined test plans, it is possible that multiple tests may be required for a single mix.

An order taker's response to the message will be based on the company's business practices. For example, the order taker may need to add a dispatch memo to the order reminding the driver and batcher to take the sample.

Ticketing

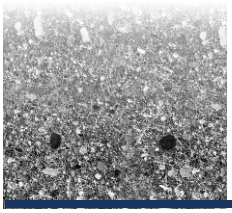
When a ticket is generated, the system will check to see if testing samples are required. If so, a confirmation screen will display:

Ticketing Sample Notification screen



Confirm each required sample buy checking the appropriate box. When a test sample is confirmed and the screen accepted, test confirmation records will be created in the Ticket Test Samples (TKTS) table.

The test records will subsequently be exported to the Fire-Q system for result management.



Rebates and Royalties

Rebates and royalties are often an essential part of the concrete and aggregate business. COMMANDseries can easily handle all aspects of rebates and royalties. Areas of COMMANDseries that report prices, costs, and gross margins have been modified to incorporate rebate and royalty amounts. Rebates and royalties can be tracked from the Job phase all the way through the distribution and delivery phase.

Note: When a Quote is created from a Job and when a Project is created from a Quote, rebate and royalty information are automatically carried forward when the new Quote and Project are created.

- **Rebates** - An amount that is reclaimed from a supplier upon the sale of items that were purchased from that supplier. Rebate information that is assigned to items in the Item editor is applicable for Jobs, Quotes, and Projects.

  As rebate-worthy items are ordered and ticketed, rebates are associated with the orders and tickets as a **reduction in the Material Cost** of the item sold.

- **Royalties** - An amount paid to a land owner for items that were manufactured or extracted from the land. Royalty information that is assigned to items in the Items editor is applicable for Jobs, Quotes, and Projects.

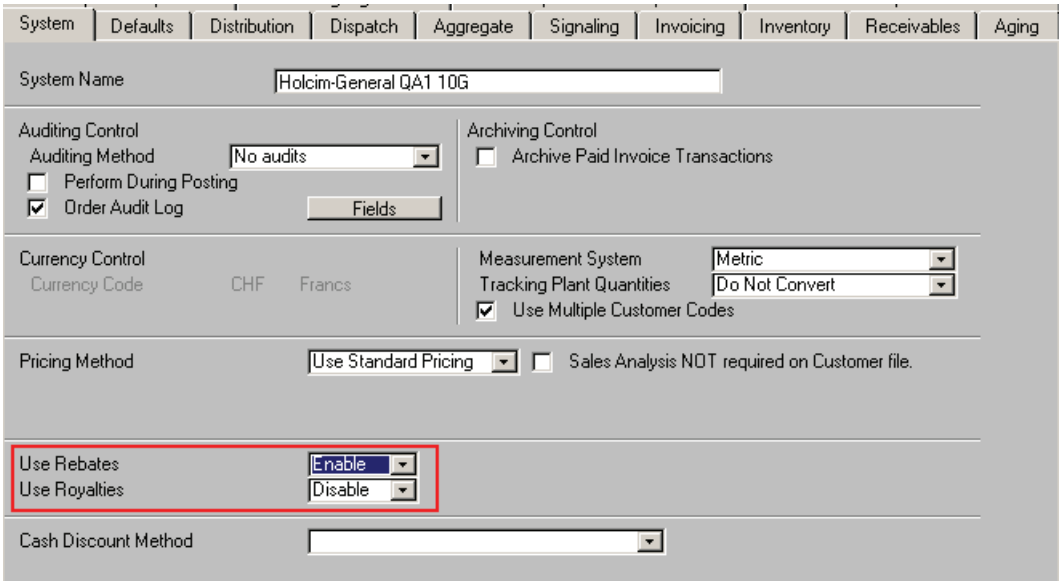
  As royalty-worthy items are ordered and ticketed, royalties are associated with the orders and tickets as an **increase in the Material Cost** of the item sold.

This document will take you through all steps needed to associate rebates and royalties with specific items, as well as what to do in the order entry process.

Configuration

The Configuration > System tab has been updated with fields used to determine whether or not rebates and/or royalties should be applied. If `Disable` is selected for either the **Use Rebates** or **Use Royalties** field, none of the associated rebate or royalty fields or tabs will display on any screen. If `Enable` is selected in these fields, rebate and royalty fields will display on all associated screens.

Configuration - System Tab (EDTCNFX)



Workflow

When **Enabled** is selected for **Use Rebates** and **Use Royalties** on the Configuration > System tab, the following information should be entered in COMMANDseries:

Contact Type Codes

Item Editor

Jobs/Quotes/Projects > Products Tab

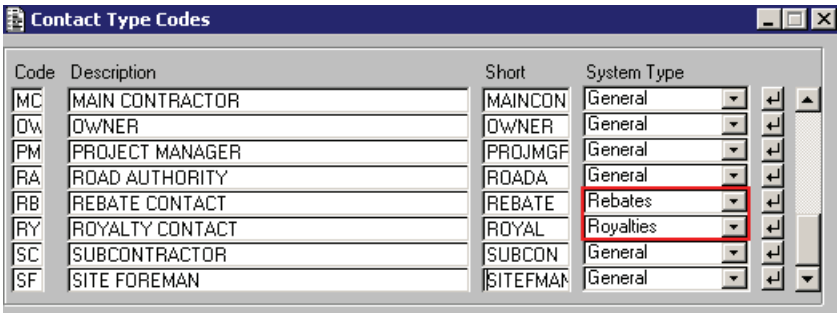
Ticketing

Update Costs & Prices for Orders & Tickets

Contact Type Codes

To begin setting up rebates/royalties, create some Contact Types that have **Rebates** and **Royalties** selected in the **System Type** field on the Contact Type Codes editor {Files > General Information > Contacts > Contact Types}. See the below example:

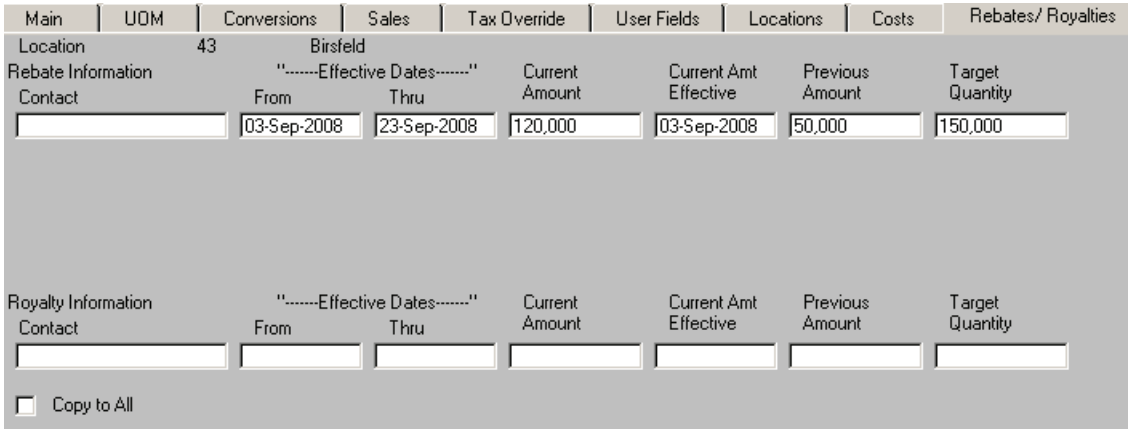
Contact Type Codes (EDTCTTY)



Item Editor

Next, go to the Items editor {Files > Item Information > Items}. A new **Rebates/ Royalties** tab has been added to this screen so that rebate/royalty information can be specified for different items. This tab will only be available for Concrete and Aggregate item types. If either rebates or royalties is not enabled in the Configuration editor, the Rebates/ Royalties tab will display, but information pertaining to the disabled feature will not display.

Items - Rebates/Royalties Tab (EDTIMST)



Complete all fields for the relevant sections below:

- **Contact** - The contact is the supplier (or other rebate-related entity) for which a rebate is associated; or, in the case of a royalty, is the landowner (or other royalty-related entity) for which a royalty is associated. Detail on the **Contact** field to select from a list of contacts. Only those contacts who have a Contact Type of **`Rebate`** or **`Royalty`** will display when detailing on this field.
- **Effective Dates** - Effective dates are those dates for which that rebate/royalty, with its contact and target quantity, is to be used. It is like a contract that is good within the specified dates. Tickets look for the valid rebate/royalty using this date range. Any ticket for a date prior to the effective date will use the **Previous Amount**. All tickets up to that date will use the **Previous Amount**, and on or after that date will use the **Current Amount**.
- **Current Amount** - Sometimes, the amount of the rebate/royalty can change within one effective date range. Enter the changed rebate/royalty amount in this field. The previous **Current Amount** will then move over to the **Previous Amount** field upon changing the former.
- **Current Amt Effective** - The effective date range for the amount entered in the **Current Amount** field.
- **Previous Amount** - The last-used **Current Amount** for the rebate/royalty.
- **Target Quantity** - Used to limit the life of the rebate/royalty within its Effective Date, causing the rebate/royalty to exist only until the target quantity is reached. For example, if halfway into the Effective Date range, rebates have been applied to tickets consuming the entire Target Quantity specified, the rebate would cease to be effective.

Accept the Items editor to save the rebate and royalty information pertaining to that item.

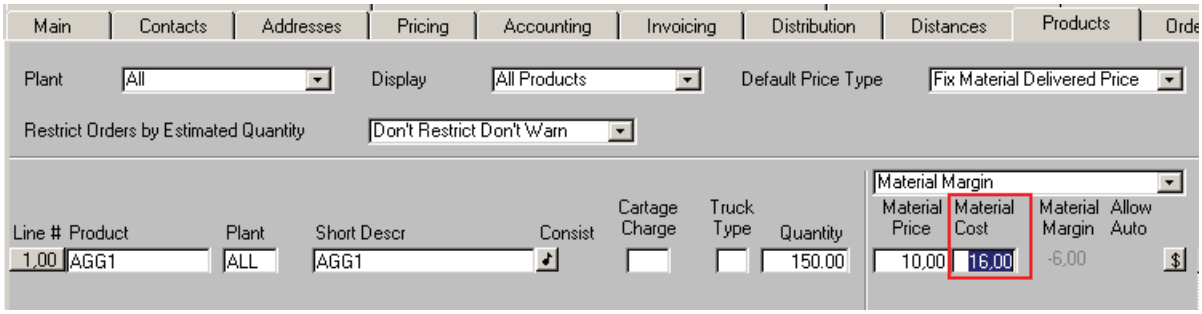
Jobs/Quotes/Projects > Products Tab

Now a Job, Quote, or Project can be created using the rebate and royalty information just set up.

Items already on the Products tab on the Jobs, Quotes, and Projects editors will be updated automatically when rebate and/or royalty information has been updated for those items on the Items editor. When rebates and royalties are enabled, the **Material Cost** (found on the **Products** tab for Jobs, Quotes, and Projects) will be configured differently:

```
Material Cost = Item Cost - Rebate Amount + Royalty Amount
```

Products Tab - Material Margin (EDTPRDL1)



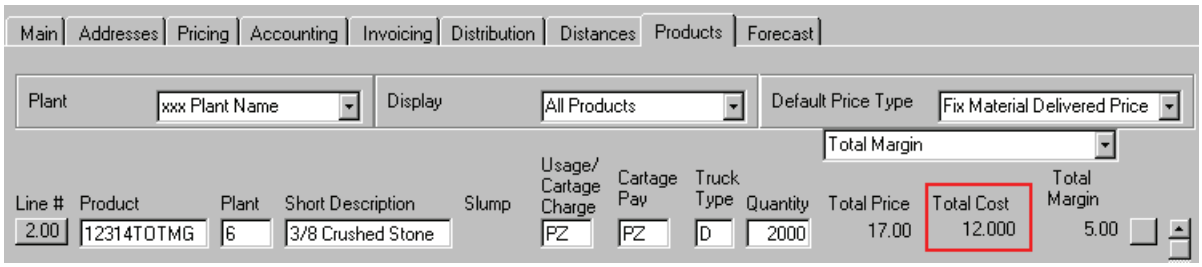
Note: The effect of rebates and royalties will be reflected on each ticket, and will also be reflected in the Material Cost on the Preliminary Invoice Register. In addition, this amount will be displayed on the following COMMANDexecutive reports: Gross Margin, Contribution, and Top Customer.

The **Material Cost** field on the Products tab (for Jobs, Quotes, and Projects) is now editable. Detailing on the **Material Cost** field will bring up a new screen: **Project Product Standard Cost** (EDTPRDLB). Typically, costs are maintained for each item at the location level. When an item is added to a Job, Quote, or Project for a certain location, that cost is retrieved for the line-item to show margins. Some supply plants, however, do not maintain item information at the location level because they are not actual, inventory-keeping plants. Therefore, since no cost will be retrieved for the item at that location, the **Project Product Standard Cost** screen lets users enter the cost for the item supplied at this plant so that target margins can be viewed.

Project Product Standard Cost (EDTPRDLB)

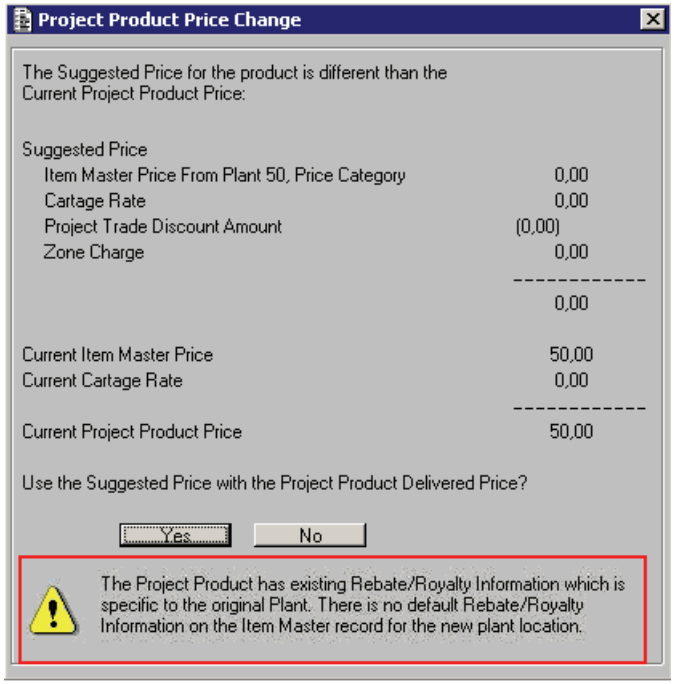
Back on the Products tab, select **Total Margin** from the drop-down list located under Default Price Type. The **Total Cost** will display the adjusted Total Cost, including the effect of rebates and royalties on the Material Cost.

Products Tab - Total Margin (EDTPRDL1)



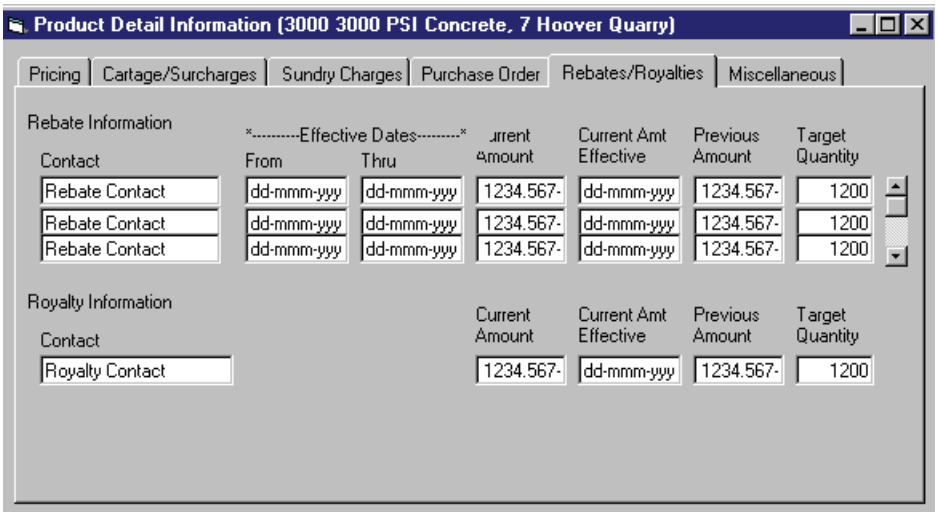
When a Plant is changed for an item that has a rebate or royalty associated with it on the Products tab, the **Project Product Price Change** screen will display with the below new warning message, letting the user know that if the plant is changed for this item, the associated rebate/royalty information will not be carried forward:

Project Product Price Change (EDTPRDLA)


Project Product Price Change
The Suggested Price for the product is different than the Current Project Product Price:
Suggested Price
Item Master Price From Plant 50, Price Category 0,00
Cartage Rate 0,00
Project Trade Discount Amount (0,00)
Zone Charge 0,00
0,00
Current Item Master Price 50,00
Current Cartage Rate 0,00
Current Project Product Price 50,00
Use the Suggested Price with the Project Product Delivered Price?
Yes
No
The Project Product has existing Rebate/Royalty Information which is specific to the original Plant. There is no default Rebate/Royalty Information on the Item Master record for the new plant location.

Continuing on the Products tab, select the **$** button next to an item to bring up the **Product Detail Information** screen. A new **Rebates/Royalties** tab has been added to this screen, so that you can quickly view rebate/royalty information for the associated item. This screen will load default rebate/royalty information taken from the Items editor for new items added to the Job, Quote, or Project.

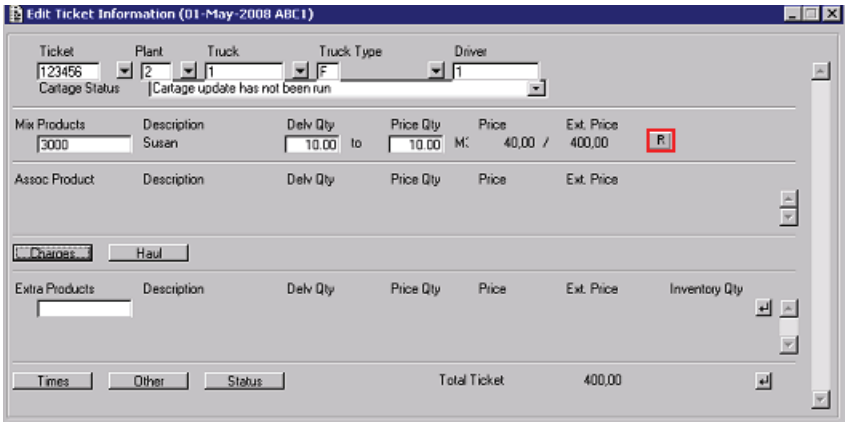
Product Detail Information - Rebates/Royalties Tab (EDTPDTL5)



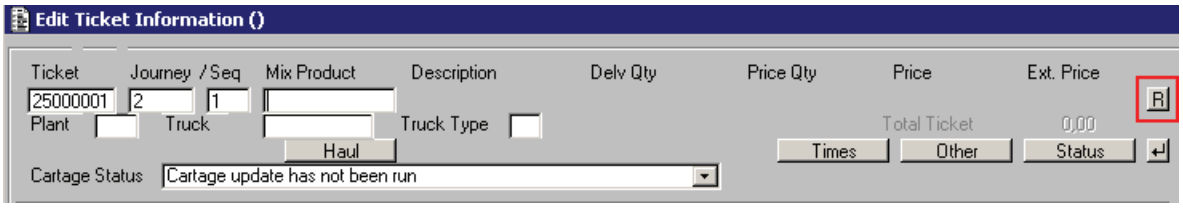
Ticketing

The various **Edit Ticket Information** screens {Invoicing > Edit Orders & Tickets > Tickets button} have also been enhanced to accommodate rebate and royalty information. A new **R** button has been added to these screens for rebate and royalty information.

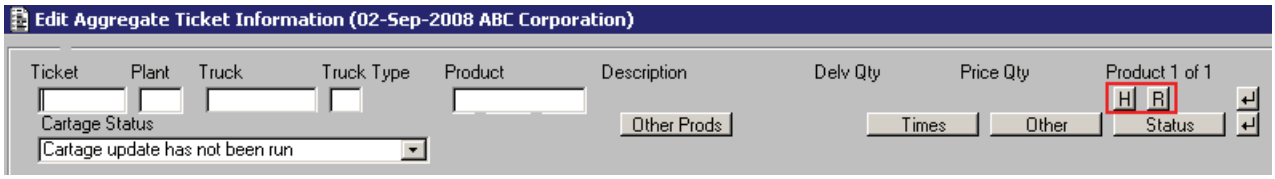
Edit Ticket Information - Concrete Individual (EDTPREP6)



Edit Ticket Information - Concrete Multiple (EDTPREP7)



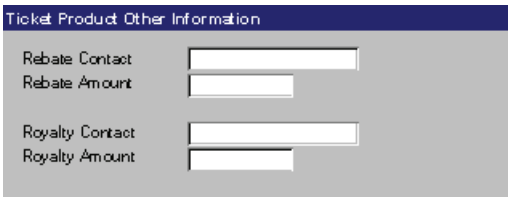
Edit Aggregate Ticket Information (EDTPREP8)



Note: On the **Edit Aggregate Ticket Information** screen, the **Haul** button has been changed to display as **H**.

Click on the **R** button on any of the above screens to bring up the new **Ticket Product Other Information** screen. This screen displays the rebate/royalty amounts that were calculated and applied to the current ticket, as well as the name of the contact associated with the rebate/royalty. The information can be modified or entered directly on the screen if desired.

Ticket Product Other Information (EDTTPOI)



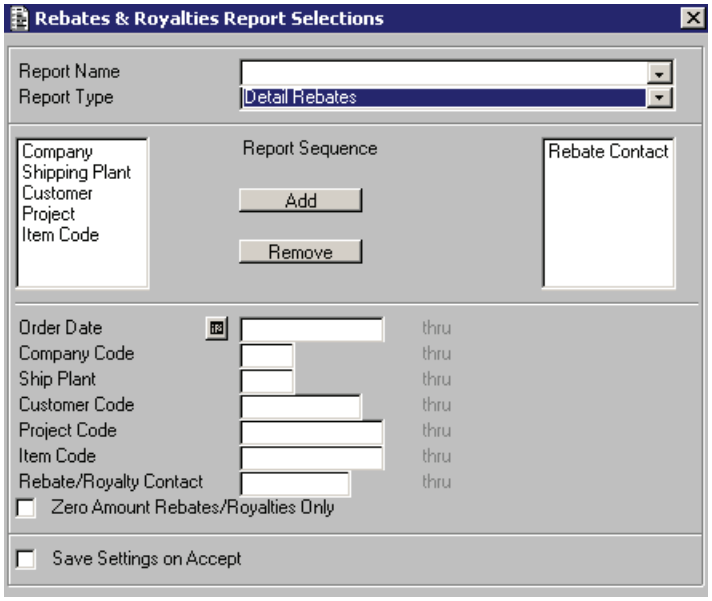
Update Costs & Prices for Orders & Tickets

The Update Costs & Prices for Orders & Tickets process will update rebate and royalty amounts.

Reporting

A new report (under the **Invoicing** option in the menu) has been created specifically for rebates and royalties. This report will list any rebates or royalties that were actually applied to tickets. This report will be useful to users as it is common practice that rebates cannot be claimed from their supplier, nor royalties paid to the land owner, until the material is actually consumed: that is, shipped on a ticket. The Rebates and Royalties Report provides the basis for companies to file for rebates and pay royalties.

Rebates & Royalties Report Selection (SELRRPT)

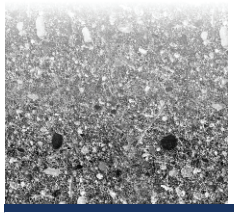


To generate the Rebates and Royalties Report:

1. Go to the **Rebates & Royalties Selections** screen {Invoicing > Rebates & Royalties Selections}.
2. Enter a **Report Name** to save this specific configuration for repeated use. (The **Save Settings on Accept** checkbox must be selected for the report criteria to save.) This step is optional.
3. Select a **Report Type** from the drop-down list. Options are:
   - Detail Rebates
   - Summary Rebates
   - Detail Royalties
   - Summary Royalties
4. In the **Report Sequence** section, highlight the report sequence option to include on the report in the left-hand box by clicking on it, and then click the **Add** button to add it to the report. If the option is successfully added, it will move into the right-hand box. The report will be broken down by the first option added to the report, and then further broken down by any other options added.

   To remove an option, click on it in the right-hand box, and then click the **Remove** button. The option will return to the left-hand box.
5. Enter an **Order Date** or a range of dates to appear on the report.
6. Enter a **Company Code** or a range of company codes to appear on the report.
7. Enter a **Ship Plant** or a range of ship plants to appear on the report.
8. Enter a **Project Code** or a range of project codes to appear on the report.
9. Enter an **Item Code** or a range of item codes to appear on the report.
10. Enter a **Rebate/Royalty Contact** or a range of contacts to appear on the report.

11. Select **Zero Amount Rebates/Royalties Only** to have the report display only those rebates and royalties with zero as their amount.
12. **Accept** the screen to generate the report.



Ticketing

An order in COMMANDconcrete is, essentially, a planned delivery. It has all the information needed to get the right material to the right customer at the right time. All orders in COMMANDseries have two components: an order code and an order date. Each combination of code and date is unique; you may have several orders on the same date; after the second day, you will have two orders with the same order code, but you will never have two orders with the same combination of order code and date.

While an order describes what you intend to do, a delivery ticket describes exactly what you did. When a load is dispatched, a delivery ticket is generated, recording what material was dispatched and where it went. This information is used to bill customers for their material. Three things define a ticket: the order code, the order date, and the ticket number.

The Ticketing function lets you generate delivery tickets for previously entered orders either by dragging and dropping trucks on the Tracking screen, or through the Ticketing screen. Tickets are printed at the plant seconds after they are printed or typed by the dispatcher. The dispatcher can generate tickets with as little as two pieces of information: the order number and truck number. Tickets can also be canceled, reactivated, or retyped.

You can also generate a ticket for a future day's order.

The following is applicable for users using the tabbed Order Entry screen with enhanced functionality:

- When the main product is selected for ticketing, only products from the same schedule can be added to the ticket. You cannot add main products from other schedules.
- Different schedules from the same order are not allowed on the same Journey. When there is more than one schedule for the same order, two separate tickets will be printed.
- Multiple mortar products can be entered on one order that has different schedules; however, a truck that carries only one mortar product to different customers must have different orders.
- Multiple schedules will not be allowed for block delivery.

Aggregate Ticketing

- The Aggregate Ticketing editor will remain the same; however, the **Delivery Method**, **Hauler Code**, and **Truck Code** will be defaulted from the Schedule as opposed to the Order. If any of these fields are blank, they will be defaulted from the Order.
- When the **Order Code** is selected, the product code and its associated information will be defaulted from the **Item Code**; the first schedule's product will default next to the Truck Code.
- **Load Quantity** remains the same.
- Extra products are shipped with their associated main product and schedule.

Two Ready-Mixes on One Truck

- The Ticketing form will check to make sure that multiple ready-mix products come from the same order and same schedule, as opposed to checking only the order.
- When the same **Order Code** is added for the next ticket, the system will ensure that the same schedule product is selected, which should be the next ready-mix product for the next schedule.

COMMANDqc Mixes

Mixes created in COMMANDqc can be viewed in COMMANDseries via the **Mix Revision Number**, allowing users to identify the particular recipe of qualified raw materials. The Mix Revision Number is available in QC on the Test Specimen Details grid report and is viewable in several places in COMMANDseries:

- Items > Constituent tab; stored in the Item Location (**ILOC**) table.
- Delivery Notes.
  - The Order Line table (**ORDL**), saved with the mix code that is selected for the order.
  - The Ticket table (**TICK**), saved with the mix code selected for ticketing.

Use the Ticket Print document tag **REVNUM** to print the Mix Revision Number on the Delivery Note.

Topics in this section:

Ticketing Screen
Ticketing — Load Size Logic
Reprinting Tickets
Canceling Tickets
Ticketing With Prebatched Material
Maximum Gross Truck Weight
Proof of Delivery
Process Goods Returned
Unscanned Hauler Tickets Report
Print Certification Text on Delivery Notes
Greek Cancelled Ticket Print
HTML Document Format Interface
Post-Production Out of Tolerance Loads
Print/Send Tax & Cement Info to Batching System
Record Sampled Tickets
Future-Day Ticketing
Print User-Defined Fields

Ticketing Screen

Use the **Concrete Ticketing** screen {Dispatch > }to generate tickets. If mistakes are made, you can change the truck, the amount of mix, or the amount of item on a specific ticket after it has been generated using the screen. Because a delivery ticket is a legal document, care must be exercised in changing data on an already printed ticket, particularly if that load has already been batched. A batched load affects inventory, materials used, general ledger entries, and other data within the system.

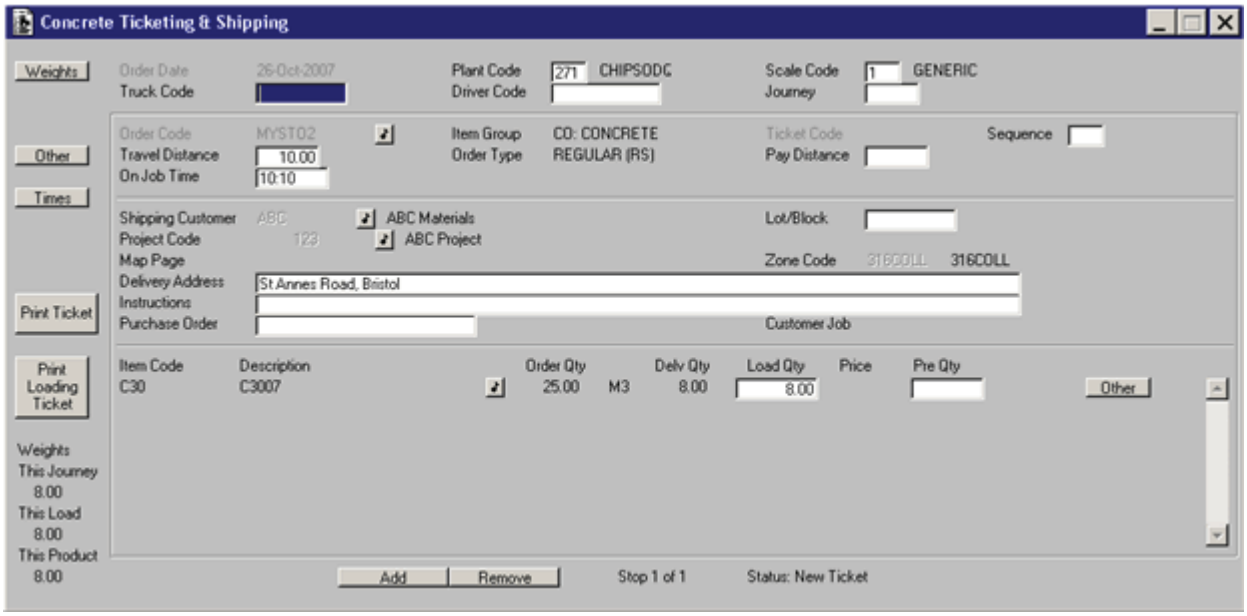
To generate a ticket using the Ticketing screen:

1. Open the **Concrete Ticketing & Shipping** screen {Dispatch > Concrete Ticketing & Shipping}. Select the order you want to ticket by entering the **Order Date** and **Order Code**. You can also enter an order date and detail on the order code field to select from a list of orders with that date.
   - You can go straight to the **Concrete Ticketing & Shipping** screen when entering an order by pressing the **Tickets** button on the Order Entry screen.
   - If you access the **Ticketing** screen for a project order through Order Entry and have the **Allow Project Updates from Orders/Tickets** checkbox checked on the **Options** tab of the Users editor {Files> System Information > Users > Users}, you will encounter the following popup message: **`Project Information has been changed - Update Project?`**

   Selecting **`Yes`** will update your project with the following information:
   - Purchase Order number
   - Job Number
   - Delivery Address
   - Delivery Instructions
   - Map Page
   - Zone

   Selecting **`No`** will leave your project information unchanged.

   Selecting either option opens the **Concrete Ticketing & Shipping** screen.



2. Most of the necessary information is brought in from the order. Enter a **Truck Code** to assign a truck to this ticket or press <Enter> to display a list of trucks. The **Driver Code** defaults with the truck; edit this information if necessary.
   - If you change the shipping plant to a plant different from the truck's plant and leave the Plant Code field or accept the screen without leaving the Plant Code field, the system will accept the change and print the ticket.
   - [Optimization Only] If you change the shipping plant to a plant different from the truck's plant and leave the Plant Code field or accept the screen without leaving the Plant Code field, the system will request a confirmation:

     `Truck is currently at plant x,! Do you wish to ticket it?`

3. If necessary, select the **Other** button to edit the order's batching and pricing information. This information defaults from the plant file and the order.

   If the fields are available, you can adjust both the **Plant Tax Code** and the **Order Tax Code** separately on the Other Ticket Information screen, if necessary. Once the order ships only the **Plant Tax Code** may be modified.

   User Defined Comments (as opposed to User Defined Fields) are not available for editing on the ticketing screen, even if they are to print on the ticket.

4. Tab through the **Times** button—there are no times to edit when the ticket is initially created.

5. Detail on the **Delivery** field to select a delivery method. You must pick a delivery method of type **`F.O.B`** or **`Delivered`**. If you select a delivery method of type **`Delivered/F.O.B.`** you will receive an error message and be forced to choose again. If the **Required Tickets** flag is checked and you do not choose a delivery method at all, the system will not let you print a ticket and you will receive the following error message: "**`Delivery Method must be FOB or Delivery for a ticket to be printed`**."

   If an order is set to be Delivered, you must also choose a truck that is set to make deliveries. Trucks set as F.O.B. Only cannot be assigned to delivered tickets. If this does

occur, you will receive the following error message: "**Truck is configured for F.O.B. only, select a different truck or set the delivery method on the truck**".

6. The **Load Quantity** will default from the Truck's load size file or the remaining concrete on the order, unless the load size was restricted in order entry.

   If the truck has any remaining material from a previous load, that amount will appear in the **Preload Quantity** field. Any preloaded material will automatically be subtracted from the truck's load size sent to a batching system if they are interfaced. If there is no interface, you must remember to inform the batchman that there is preloaded material on the truck.

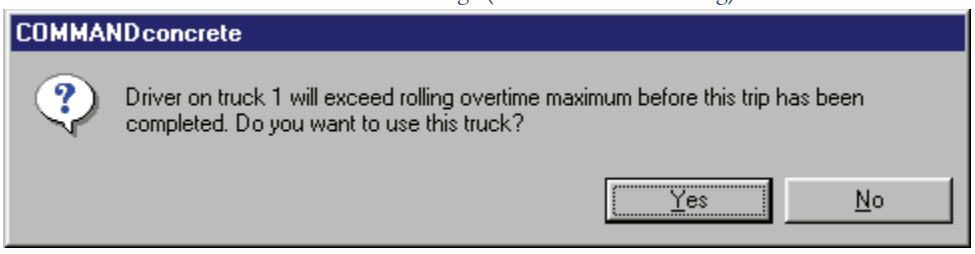
7. The **Cube Check** checkbox is used solely to send a true or false flag to the batch panel and may or may not be used depending on batch panel settings. It has no effect on the ticketing process.

8. Press the **Print Ticket** button to print the ticket.

   A number of things might happen before the ticket is issued, depending on a number of different factors:

   - If the scheduled **Hold Quantity** is exceeded,
   - If the **Load Quantity** exceeds the truck's maximum load size, a warning dialog box will appear, reading: **This truck is overloaded. Do you still wish to ticket it?** Selecting **No** will return you to the ticketing screen, where you can adjust the load size. Selecting **Yes** will continue with the ticketing process.
   - If the **Order Status** is **Hold Delivery**, **Will Call**, **Weather Permitting**, or **Review**, you will be prompted with appropriate options. Respond appropriately.
   - If the **Load Quantity** is small enough to trigger a **Minimum Load Charge**, a dialog box will appear, asking: **Do you wish to apply a Minimum Load Charge to this ticket?** Select **Yes** and the system will add a Minimum Load Charge to the ticket, based on the selected charge table. Select **No** and no charge will be added.
   - If the travel time for the load will put the driver over the limit for overtime, a warning dialog box will appear.

   Driver on truck message (EDT-overtime warning)

   
   COMMANDconcrete
Driver on truck 1 will exceed rolling overtime maximum before this trip has been completed. Do you want to use this truck?
Yes
No

   Select **Yes** to continue with the ticketing procedure. Select **No** to return to the Ticketing screen; from there you can assign a different driver or truck, or press the **Overtime** button to get a summary of the driver's current hours.

9. Once any questions concerning the ticket have been resolved, the ticket will print. The assigned ticket number will appear in the message frame at the bottom of the screen.

Ticketing — Load Size Logic

When an order is recalled in a ticketing screen, the ticketing form itself suggests a load size for the truck/load. This load size is determined in one of two ways:

- Getting the scheduled load size from the load by load schedule (Default).
- If the flag in the schedule is set appropriately, get the scheduled load size from the truck.

In either case, the scheduled load size is set to the remaining quantity on the order line if the remaining quantity is less than the scheduled load size.

To validate under/over load condition:

1. The system will always validate that the load size suggested by the system or entered in ticketing does not exceed the truck's maximum capacity. A truck overloaded message will display if the validation fails.
2. If you change the suggested load size in ticketing, the system will validate that the changed quantity is not less than the truck's minimum load size. A truck under-loaded message displays if the validation fails.

Reprinting Tickets

This function only reprints existing ticket information; it does not re-calculate or update any information in the files.

The Reprint Tickets function is available in the Options menu in all ticketing screens as well as Edit Orders and Tickets. The functionality of the screen depends on the screen from which it was called.

To reprint a current ticket:

If tickets are printed from the batch computer, this option will restack the ticket.

1.
2. Enter the **Order Date**, and select the appropriate **Order Code**.
3. From Order Entry, press the **Ticket** button to open the Concrete Ticketing & Shipping screen. From the Edit Orders & Tickets screen, go to the next step.
4. From the Options menu, select **Reprint Ticket(s)** to open the Reprint Tickets screen.

   The above graphic lists all form fields. Some fields will not display, depending on your selections.
5. If the screen was displaying an order, that order date and code will be passed to the reprint screen. If the screen was blank, then enter the Order Date and Order Code associated with the ticket(s) to be reprinted.
6. Select **Print all Tickets on Order** or specify a **Ticket Code** or range of codes.
7. If the Reprint Tickets screen has been called from Edit Orders and Tickets, you may only **Print to** a standard local or network printer.
8. Enter an appropriate **Document Format**, or detail on the field to select from a list.
9. **Accept** the screen to reprint the ticket(s).

To reprint to a plant printer:

You can only print to a plant printer if the reprint screen is called from .

1. Enter the **Order Date**, **Order Code**, and **Ticket Code**(s) as above.
2. Select **`Plant Printer`** in the **Print to** drop-down field. The lower portion of the screen will activate.
3. Specify a **Plant Code**. The reprint ticket will be sent to that plant's default ticket printer.
4. If the specified order is an aggregate order, the **Scale Number** field will display. Select the scale from the drop-down list.
5. Once the plant or plant/scale has been selected, select the plant printer to be used from the drop-down list.
6. If the selected plant is configured for plant and/or dispatch copies, corresponding checkboxes will display (defaulting as checked). Adjust if necessary.
7. **Accept** the screen to reprint the ticket(s).

Canceling Tickets

Sometimes, after a ticket has been generated, it becomes necessary to cancel the ticket. Perhaps the ticket was generated for the wrong truck, or with the wrong material.

The first step in the process is to retrieve the ticket on the Ticketing screen.

To retrieve an ticket:

1. From the Dispatch menu, select **Concrete Ticketing & Shipping**.
2. Enter the **Order Date**, and select the appropriate **Order Code**.
3. Select the appropriate Ticket Code, or detail on the **Ticket Code** field to select from a list of all tickets generated for that Order/Date.
4. The ticket will be retrieved.

With the exception of the **Truck** and **Driver Code** fields, all fields are read-only. The process from this point depends on one important question: was any concrete actually produced? If no concrete was produced, then canceling the ticket is a simple matter: the system cancels the ticket and treats it as though it were never generated. If concrete was produced, simply canceling the ticket would cause your ticketing totals and batching totals to be different.

To cancel/remove a ticket:

1. Press the **Remove** button on the toolbar, go to the File menu and select **Remove**, or press <Shift-F5>. The Cancel/Adjust Ticket Quantities screen displays.
   - Cash tickets with reconciled receipts attached cannot be canceled.
2. Confirm the ticket information.

If no concrete was produced:

1. Next to **Concrete was produced**, select **No**. A **Reason Code** field appears, and the **Price Quantity** field becomes inactive.
2. Enter a valid Canceled Item **Reason Code**, or detail on the field to select from a list.
3. **Accept** the screen. A confirmation message will display on the message line
4. The truck's status will be changed to **In Yard**.

Canceling the ticket does not delete the ticket record and its associated records from the database; it simply deactivates the ticket. That ticket number will not be reused, but will be marked as canceled on reports. The ticket will have no impact on usage reports; adjusted entries will be sent to COMMANDinventory to update inventory records.

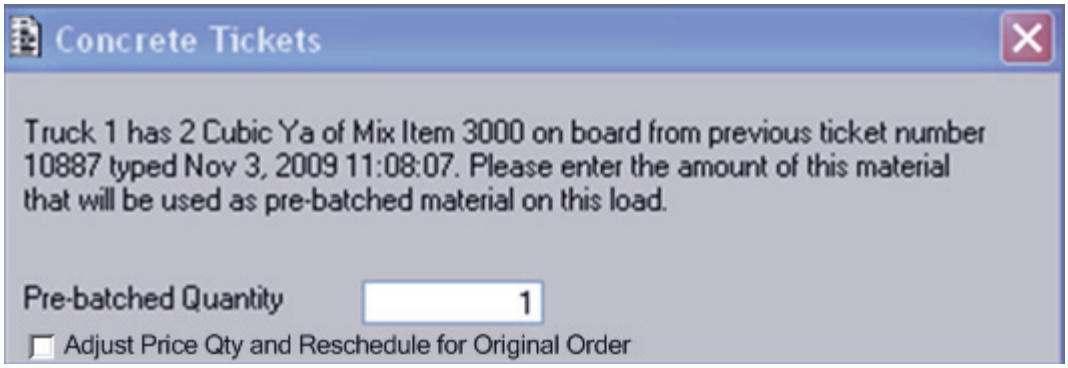
If concrete was produced:

1. Next to **Concrete was produced**, select **Yes** (default). The **Price Quantity** field will become active.
2. Enter a **Price Quantity**. This value represents the quantity for which the customer will be billed.
3. **Accept** the screen. A confirmation message will display on the message line
4. The truck's status will not change, as it still has to dispose of the material.

COMMANDseries stores the username when a ticket is removed. The Ticket Report includes that name when listing a removed ticket.

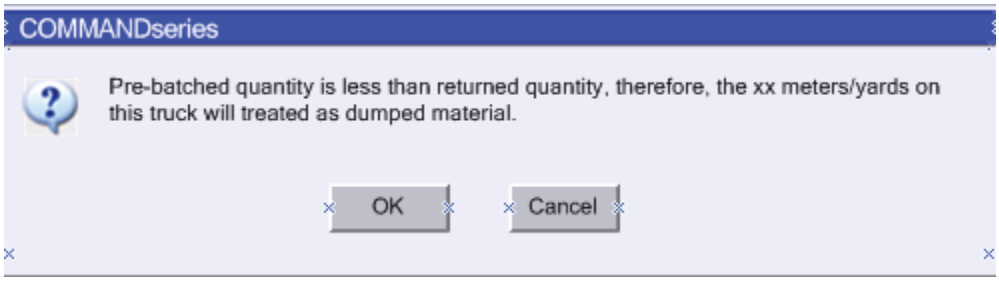
Ticketing With Prebatched Material

When a truck returns with material on board and is subsequently ticketed, the system will continue to prompt as follows:


Concrete Tickets
Truck 1 has 2 Cubic Ya of Mix Item 3000 on board from previous ticket number 10887 typed Nov 3, 2009 11:08:07. Please enter the amount of this material that will be used as pre-batched material on this load.
Pre-batched Quantity
1
Adjust Price Qty and Reschedule for Original Order

If the **Returned Concrete Options** {Configuration > Dispatch tab} is set to **Prompt User**, the **Adjust Price Qty and Reschedule for Original Order** checkbox will be displayed. Select or deselect the field as needed.

If the **Pre-batched Quantity** field is left blank and the screen accepted, the system will prompt you as follows:


COMMANDseries
Pre-batched quantity is less than returned quantity, therefore, the xx meters/yards on this truck will treated as dumped material.
OK
Cancel

If you select **OK**, the material will be treated as dumped and the truck will be ticketed with no pre-batched quantity. If you select **Cancel**, the system will open the Pre-batched Quantity screen.

Maximum Gross Truck Weight

The Maximum Gross Truck Weight feature can be set up to provide you with a warning when the combined mix weight and tare (truck) weight exceed predefined limits. This functionality is useful when you are working in areas where there is a legal limit to the maximum gross weight of a vehicle on a public highway.

This feature ensures that provided the truck weight figures in the system are accurate, a driver cannot be issued a dispatch note when the load being carried makes the truck exceed the defined maximum weight.

Truck Types are set up with a **Maximum Gross Weight**, and in turn, each truck added to the system has an associated truck type.

When an order is ticketed, the system compares the combined mix and tare weights with the maximum gross weight for the truck being used. If the maximum gross weight is exceeded, the system checks to see what action should take place, according to the shipping plant.

To define system action when the maximum gross weight is exceeded:

1. Open the Plants screen {Files > Plant & Delivery Information > Plants}, enter a plant code, and then go to the **Scheduling** tab.
2. Go to the **Maximum Gross Weight Exceeds** drop-down and select one of the following options:
   - **`Continue Without Warning`** - You will receive no warning and will be able to ticket a truck that exceeds its maximum gross weight normally.
   - **`Warn User and Continue`** - When ticketing an order, the **Maximum Gross Weight Action** screen opens, displaying the **Total Mix Weight**, **Truck Tare Weight**, **Truck Gross Weight** and **Truck Maximum Weight**. You have the option to either **Continue** and ticket the truck, or **Cancel** the action.
   - **`Warn User and Stop the Process`** - The **Maximum Gross Weight Action** screen opens, displaying the **Total Mix Weight**, **Truck Tare Weight**, **Truck Gross Weight** and **Truck Maximum Weight**. You will only have the option to **Cancel** the action.

The default value for the **Maximum Gross Weight Exceeds** drop-down list is defined on the Defaults tab of the Configuration screen.

3. Press <F2> to accept the screen and save the changes.

Proof of Delivery

Proof of Delivery, located under the Dispatch menu option, allows for input (manually or via a bar-code scanning device) of a ticket. As the ticket is returned from delivery, with a signature from the customer, either the driver scans the ticket,or a Dispatch person collects all tickets and enters them at once. This indicates that the driver completed the task by turning in the ticket. The Ticket record is updated with a **Delivery Verification Date** and **User Name**. The Plant table has a flag that requires (or does not require, depending on the setting) the Delivery Verification for Hauler Payment to take place. Therefore, at Plants that require delivery verification, drivers who do not turn in their tickets (Proof of Delivery) do not get paid.

Process Goods Returned

Sometimes, when an order or ticket has been delivered, there may be a need for some of the delivered items to be returned; the customer may not need the items, or they could have been damaged in transit. In these cases, the existing order/ticket can serve as the basis to create a "Goods Returned" ticket {Invoicing > Edit Orders and Tickets > Processed Goods Returned in the File menu}, which is the form a driver uses to pick up items from the customer site. This form can also be run at retail locations if the customer actually brings back the material. The Goods Returned ticket then goes through certain phases (Printed, Verified, or checked in at the plant). At that point, the Goods Returned ticket becomes the basis for a Credit Memo to be created.

Unscanned Hauler Tickets Report

The Unscanned Hauler Tickets report identifies those tickets that have not yet passed through the Proof of Delivery steps. You can specify the following ranges for the report:

- Ticket Date
- Hauler Code
- Truck Code
- Company Code
- Shipping Plant Code

Select **Page Break Between Haulers** to have each hauler broken down on separate pages.

Print Certification Text on Delivery Notes

With the introduction of EN 206-1 in Europe for item certification, companies are required to print certification information on delivery notes, including information about the item that is plant-specific and mix-specific. This information will inform the customer of a load's conformity to EN 206-1.

EN 206-1 is a European standard that specifies requirements for various aspects of concrete creation, including (but not limited to), constituent materials, verification of the properties of fresh and hardened concrete, and production control procedures.

In addition, anew construction law and technical regulation for concrete production requiring that legal text be printed on delivery notes and associated with items was introduced in 2009 in Croatia and is expected to be in power for Germany (2009) and Switzerland (2010). Instead of associating legal text with the Mix Design Code, the system will associate it with the SAP item (Quality Concrete Code). Five text fields will be imported for the SAP Item, Item Location, and Mix Design Code. This text will be printed on the delivery note and interfaced to the Batch Computer.

The certification Data In text will be maintained at the Item location level. The legal text will be associated with the Concrete Code and Mix Design at the Production (Location/ Plant) level.

In COMMANDseries, you can:

- Use images in different formats (.gif and .jpg) to represent symbols for national certification standards and associate one of the images with one or more plants through a new setup screen.
- Enter national standard text (up to 255 characters) on the new setup screen and associate the text with one or more plants.

When a delivery note is produced, COMMANDseries will check to see if the mix and its constituents (excluding water) are certified. If so, certification information will be stored on the delivery note. If not, certification information will not be stored on the delivery note.

Certification

There are two types of items: certified and non-certified.

- **Certified** - The mix and all constituents (except water) are certified for EN 206-1.
- **Non-Certified** - Either the mix or any of the constituents (excluding water) are not certified for EN 206-1.

Mix certification is stored only on the delivery note when the item is certified and the certification expiration date has not passed.

ILOC Table

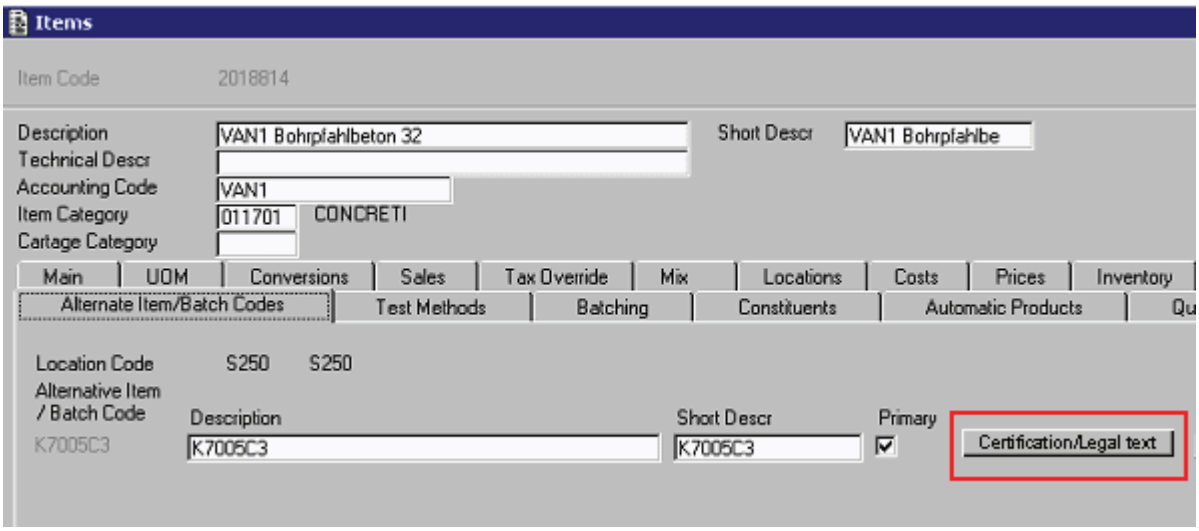
Certification information for cement, aggregate, admix, additions, and mixes can be imported from SAP to the Item Location (ILOC) table in COMMANDseries. The following new columns have been added to the ILOC table to hold the certification information:

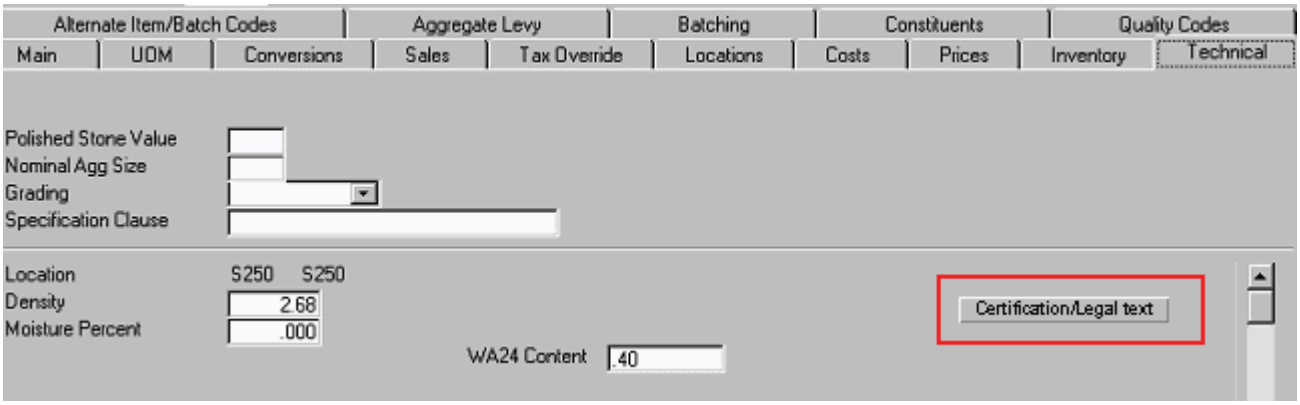
- **Certification Number** (`CERT_NUMBER`) - 255 Characters
- **Certification Body** (`CERT_BODY`) - 255 Characters
- **Level of Certification** (`CERT_LEVEL`) - 15 Characters
- **Year of Certification** (`CERT_YEAR`) - 4 Characters
- **Certification Expiration Date** (`CERT_EXP_DATE`) - 10 Characters

Certification information is specific to a mix or a constituent item at a certain location.

Items Editor

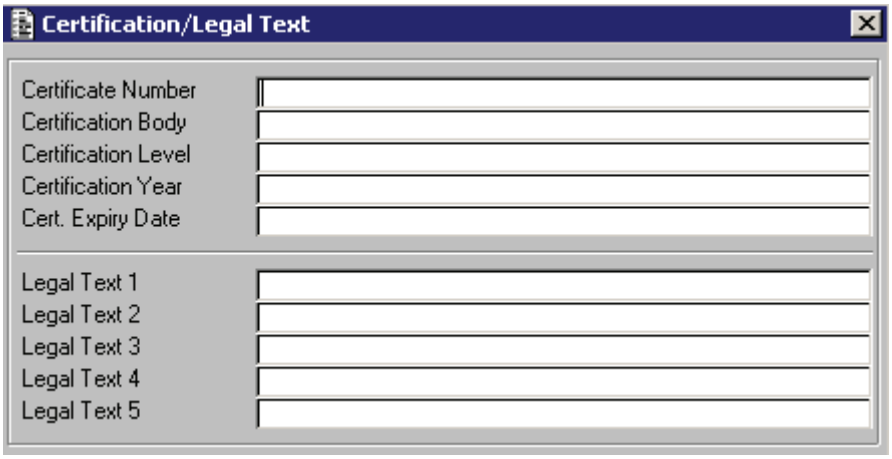
The Items > Alternate Items/Batch Codes tab and Technical tabs have been updated with a new button: **Certification/Legal text**:





On either tab, press the **Certification/Legal Text** button to bring up the Certification/ Legal Text screen where you can enter all certification and legal text for the associated item.

Certification/Legal Text Screen (EDTCERT)



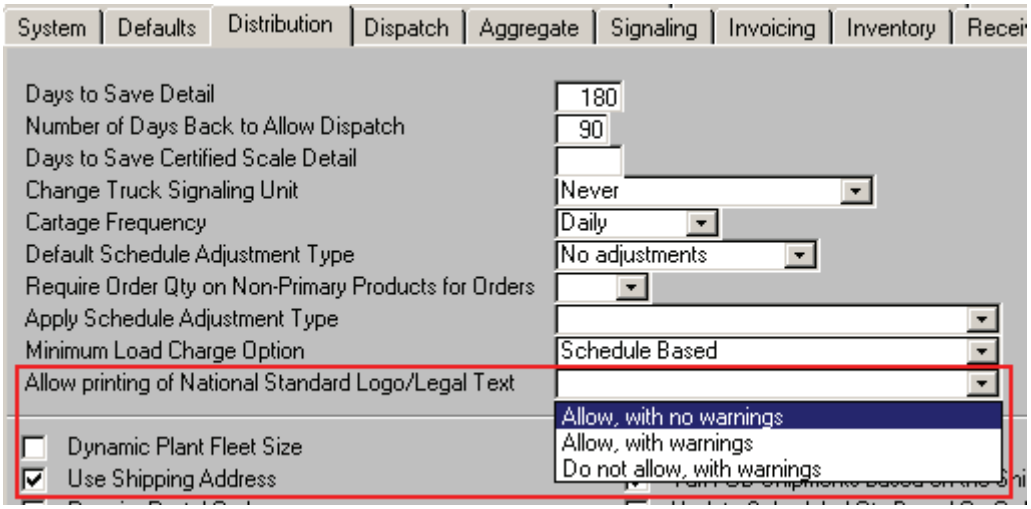
Configuration

A new drop-down field, **Allow Printing of National Standard Logo and Legal Text**, has been added to the Configuration > Distribution tab that will control the printing of the National Standard Logo, Certification Fields, and Legal Text on the delivery note on the Concrete Ticketing and Shipping screen.

Below are the options for this field (the logo is set up on the Configuration > National Standards tab):

- **`Allow, with no Warning`** (if Certification rules are not met, the logo and legal text will print with no user warning)
- **`Allow, with Warning`** (if Certification rules are not met, the logo and legal text will print with a user warning)
- **`Do Not Allow, with Warning`** (if Certification rules are not met, the logo and legal text will NOT print with a user warning)

Configuration > Dispatch Tab (EDTCNFX)



Below is the new logic for determining certification for a Concrete Mix:

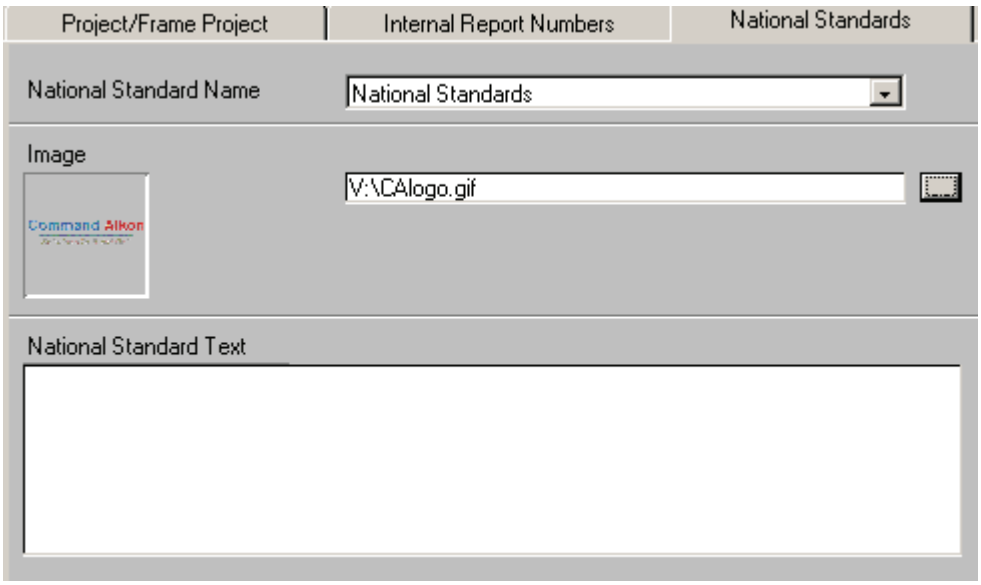
- First, check the SAP Concrete Code + Location Code + Mix Design Code in the IMLB table.
- Next, check the Mix Design (Alternate Item) + Location Code in the ILOC table.

Finally, check the SAP Concrete Code + Location Code in the ILOC table.

The actual certification text is set up on the Configuration > National Standards tab.

To enter certification information:

1. Access the National Standards tab {Files > General Information > Configuration}.



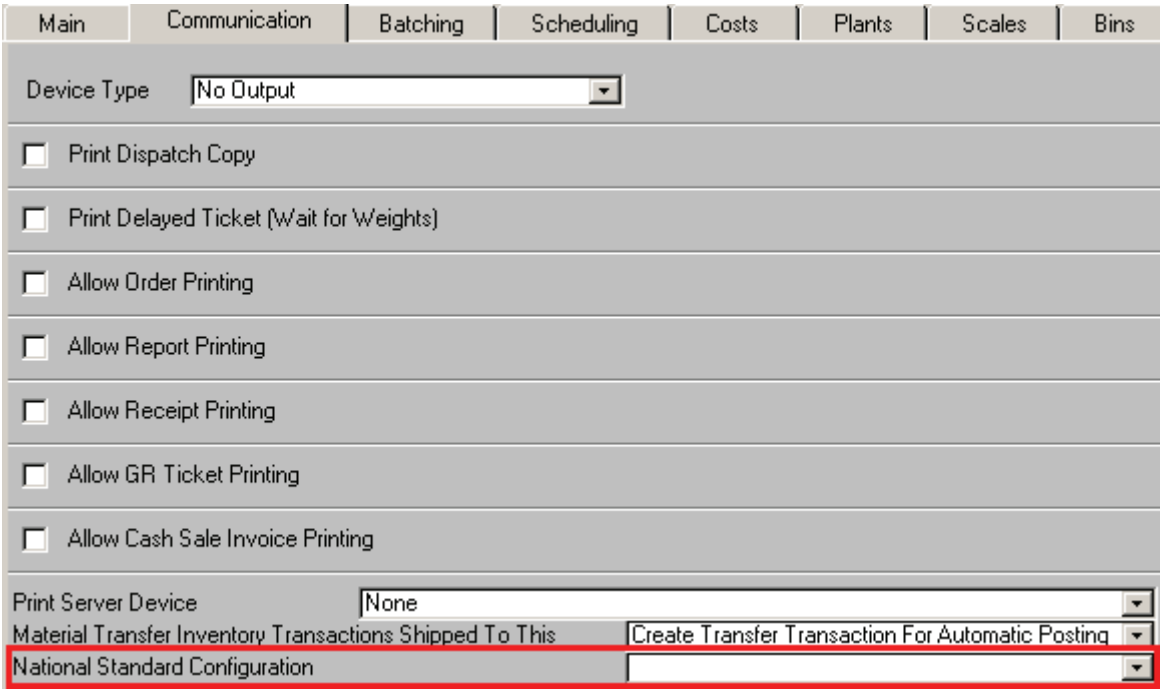
2. Enter a name for this certification in the **National Standard Name** field. Press <Enter> while the cursor is within this field to select from previously entered configurations. You can then update the information for that certification and save it.
3. If you have an image you wish to print with your certification text, enter the file location in the **Image** field.
4. Enter the certification text in the **National Standard Text** field. Up to 255 characters can be entered here.
5. Press **F2** to save the certification.

Information entered above will be saved in the below fields on the NSCF (National Standards Configuration) table:

Field Name	Field Description	Type
NS_CONFIG_NAME	Configuration name.	Char (20)
NSIM_FILE_NAME	Image file name.	Char (50)
NS_TEXT	Free-format text for National Standards text.	Char (255)

Selecting a Certification

Once you've created a certification in the Configuration editor, you can assign it to a specific plant. The Communication tab on the Plant editor has been modified so you can select the proper certification to be printed for the delivery note. The new **NS_CONFIG_NAME** field has been added to the PLNT table to accommodate the **National Standard Configuration** field on the Plant editor.



Document Tags

The layout of the printed delivery note with certification information will be controlled through the use of document tags. The following new document tags have been created for certification information. You should apply these document tags to the ticket print document formats so they are included in the ticket print.

Document Tag	Tag Text/Tag Code	Type (Calc, Lookup, Fixed)
NSTEXT	National Standard Text	Lookup
CERTNO	Certification Number	Calc
CERTBO	Certification Body	Calc
CERTTX	Certification Text	Calc
CERTYR	Certification Year	Calc
CERTEX	Certification Expiration Date	Calc
NSIMGE	National Standard Image	Image/Calc

Document tags will print when the following is true:

- The mix is certified and the certification date has not expired.

- The constituent is certified and the certification has not expired. (Water is not a constituent that needs certification.)

Database Updates

The following fields have been added to the IMLB (Item Location Batch Code) table to accommodate the shift of certification fields to the SAP Quality Concrete Code:

- **CERT_NUMBER** - Certification Number
- **CERT_BODY** - Certification Body
- **CERT_LEVEL** - Certification Level
- **CERT_YR** - Certification Year
- **CERT_EXP_DATE** - Certification Expiration Date
- **LEGAL_TEXT_1** - Legal Text
- **LEGAL_TEXT_2** - Legal Text
- **LEGAL_TEXT_3** - Legal Text
- **LEGAL_TEXT_4** - Legal Text
- **LEGAL_TEXT_5** - Legal Text

The following fields have been added to the Item Location (ILOC) table to ensure that certification is maintained for constituent items:

- **LEGAL_TEXT_1** - Legal Text
- **LEGAL_TEXT_2** - Legal Text
- **LEGAL_TEXT_3** - Legal Text
- **LEGAL_TEXT_4** - Legal Text
- **LEGAL_TEXT_5** - Legal Text

The following field has been added to the Configuration (CNF2) table to provide for controls when printing the National Standard Logo and Legal Text:

- **ALLOW_PRINT_NATIONAL_STD_LOGO_CODE**

In addition to the above database tables, the **Generic EU Batch Interface** has been updated with the below fields:

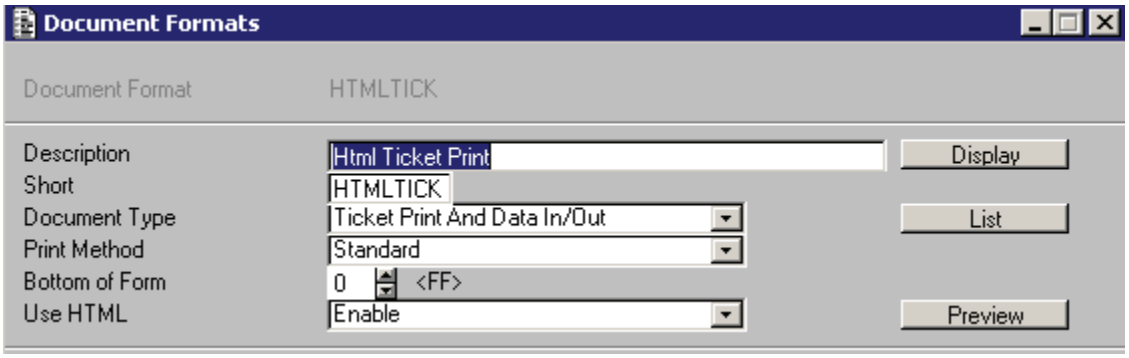
- Interface Field 091 **Mix Legal Text 1** - AN/40
- Interface Field 092 **Mix Legal Text 2** - AN/40
- Interface Field 093 **Mix Legal Text 3** - AN/40
- Interface Field 094 **Mix Legal Text 4** - AN/40
- Interface Field 095 **Mix Legal Text 5** - AN/40

HTML Tickets

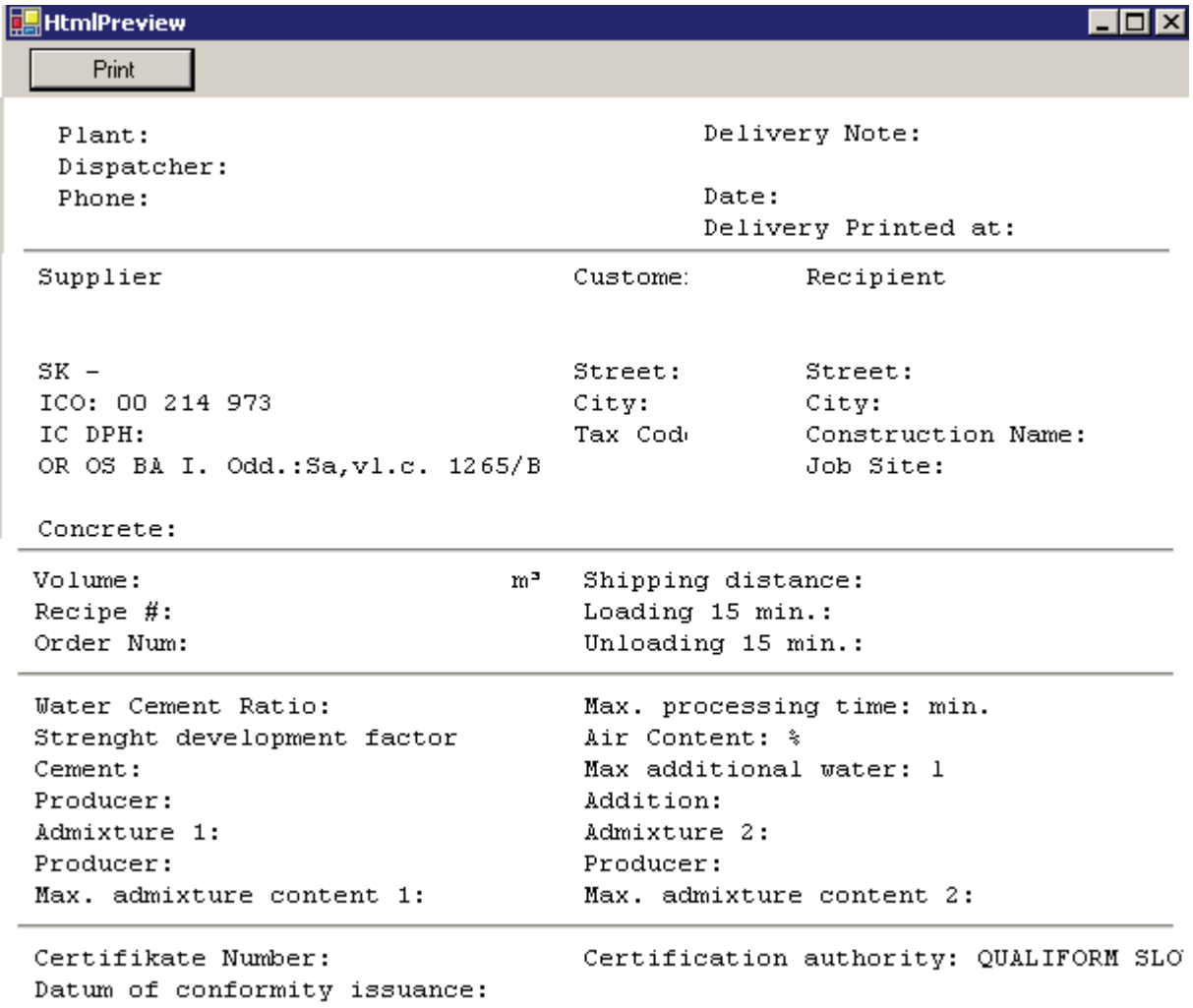
You can create HTML delivery notes using the new **HTMLTICK** document format.

To create an HTML ticket:

1. Go to the Document Formats screen {Files > General Information > Documents > Document Formats} and enter **HTMLTICK** in the **Document Format** field and tab.



2. Press the **Preview** button to view a preview of what the HTML ticket will look like at this default stage. You can choose to close the screen or print the layout example.



3. To change the HTML ticket layout, press the **List** button on the Document Formats screen. You can manipulate all elements on the ticket by changing their **Line**, **Begin At**, and **End At** properties. Press the **Detail** button next to each item to view more

information on the Document Format Field screen. Be sure to add the **NTSTTX** document tag in the **Name** field on the Document Format Field screen.

To change the placement of fields, boxes, lines, and images, look for those words under the Name column on the Document Fields screen. If you wish, you can add new fields, boxes, lines, and images by pressing **F6**.

4. Press **F2** to save once you are satisfied with your changes.

Greek Cancelled Ticket Print

In order to meet legal and fiscal requirements in Greece, COMMANDseries has been updated so you can print a ticket that references the previous ticket and a unique auditing number. This document can be printed for all cancelled and removed tickets in COMMANDseries. This auditing sequence number will be printed on the ticket and provides an accurate auditing trail for those tickets that have been removed or cancelled. The removed/cancelled ticket code will be used for external reporting, printing, and auditing purposes only.

Next Numbers Editor

Enter the auditing sequence code for removed/cancelled tickets as you would a "normal" ticket sequence number in a new **Ticket Sequence** field on the Next Numbers editor.

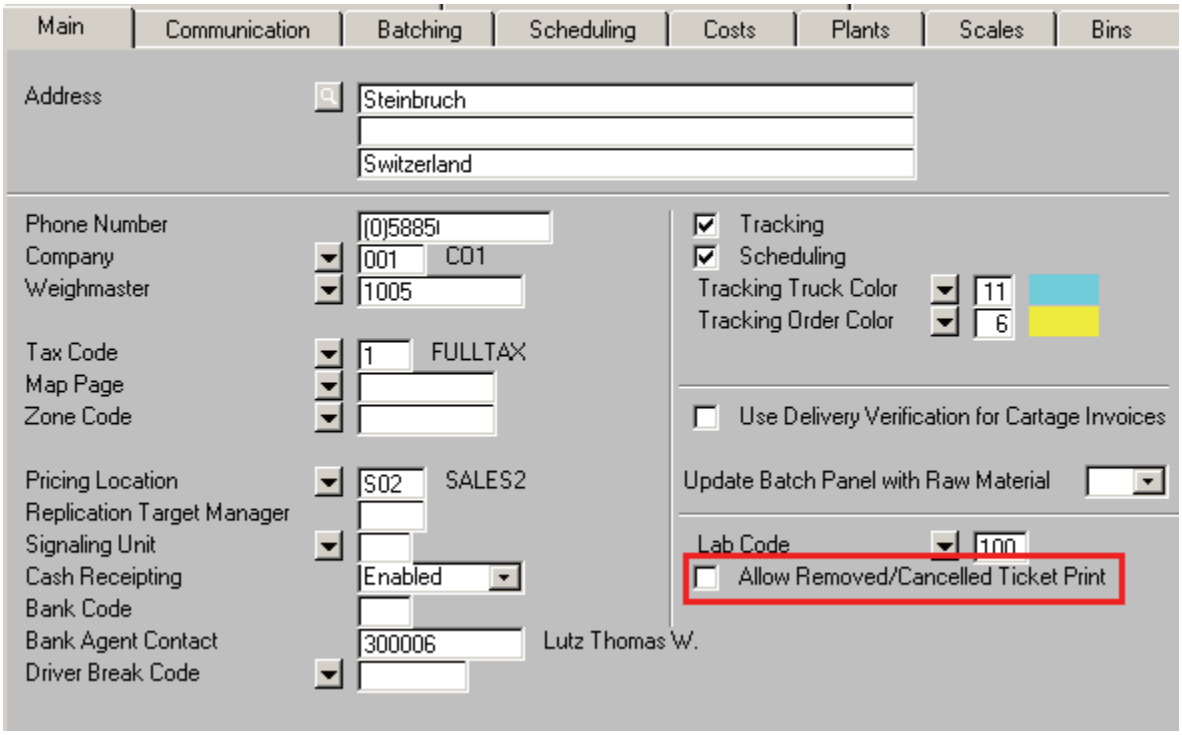
For information on how to set up Next Number sequences, please consult the *Setting Up the System* user guide.

Plants Editor

Several new options have been included in the Plants editor so you can determine how each plant handles removed/cancelled tickets. New fields are located on the Main, Communication, and Next Numbers tabs.

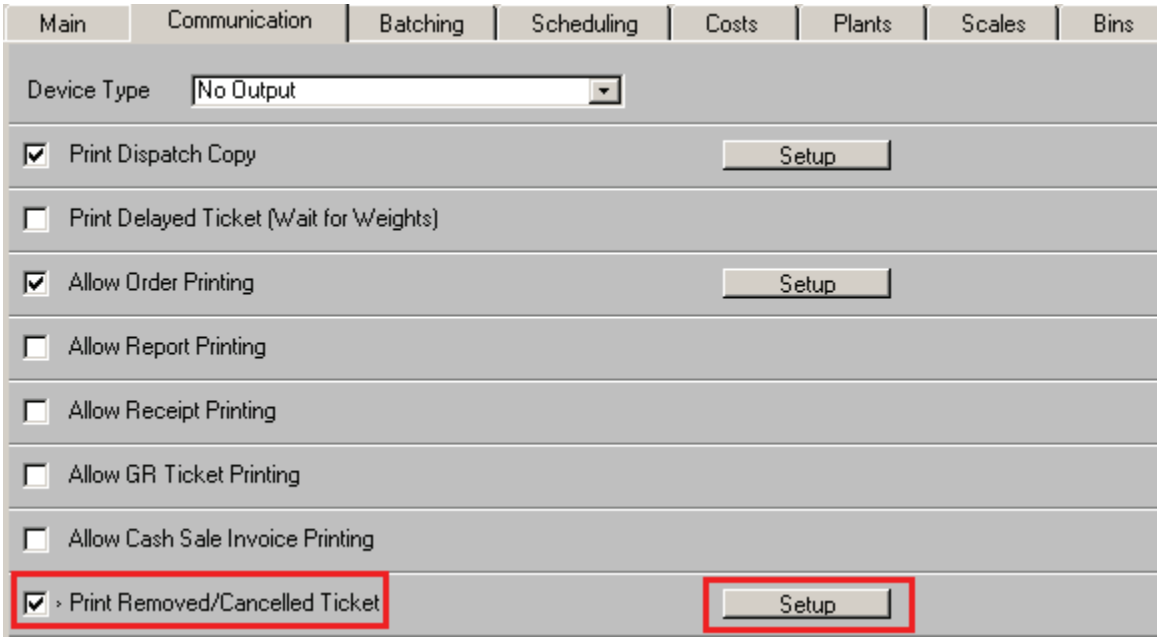
Main Tab

A new checkbox, **Allow Removed/Cancelled Ticket Print**, has been added to the Plants > Main tab. Select this option to have the system automatically assign the removal/ cancellation sequence number to the ticket when Ticket Print is performed.

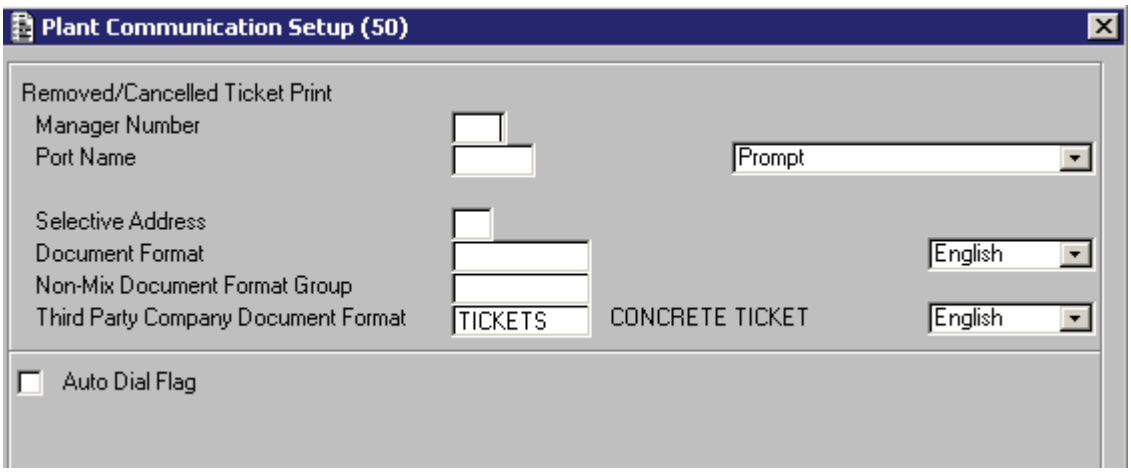


Communication Tab

Print Removed/Cancelled Ticket has been added to the Plants > Communication tab. When selected, a **Setup** button will appear.

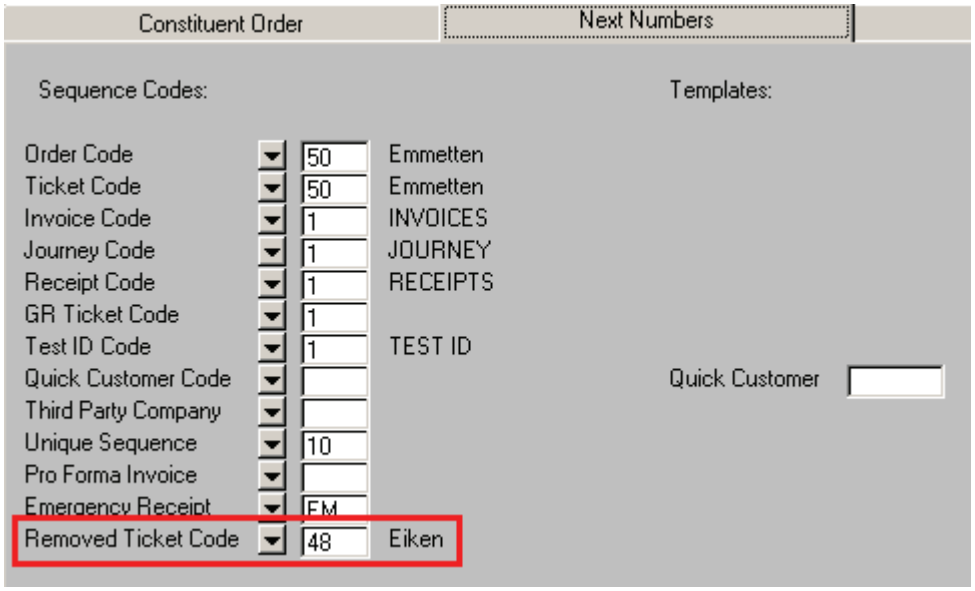


Click on the **Setup** button to bring up the Plant Communication Setup screen. Complete this screen as you would any of the other existing Plant Communication Setup screens associated with the Communications tab to ensure that removed/cancelled tickets are automatically printed once the ticket has been removed/cancelled during the ticketing process.



Next Numbers Tab

A new **Removed Ticket Code** field has been added to the Plants > Next Numbers tab. Select the Next Numbers sequence code you set up previously on the Next Numbers editor. The removed/cancelled ticket sequence number cannot be the same as the sequence number used for "normal" ticket transactions.



Ticketing

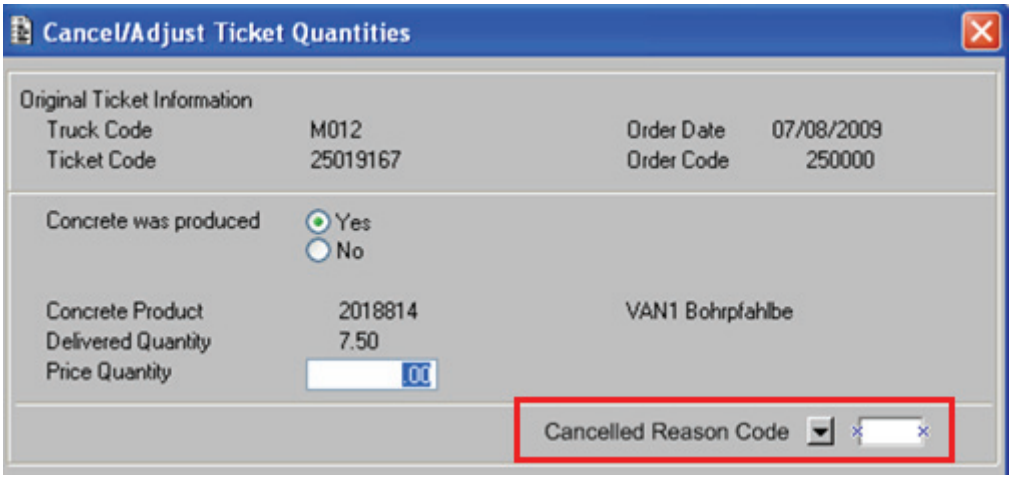
When a ticket is removed/cancelled through the Concrete Ticketing & Shipping form, the system will look to the options you just set up in the Plants editor to determine what to do

with the ticket. If **Allow Removed/Cancelled Ticket** has been selected on the Plants > Main tab and you remove/cancel a ticket:

- The next sequence number assigned on the Plants > Next Numbers tab will be assigned to the ticket.
- The ticket's information will be sent to the assigned printer or other device using the document format code you selected on the Plant Communication Setup screen for **Print Removed/Cancelled Ticket**.

If **Allow Removed/Cancelled Ticket Print** was selected on the Plants > Main tab, you will have to include a **Reason Code** when removing/cancelling the ticket on the Cancel/Adjust Ticket Quantities screen:

- If a ticket is removed and no concrete was produced, provide the usual reason code.
- If a ticket is cancelled and concrete was produced, a **Cancelled Reason Code** will be required in the new field below:



You cannot reactivate a previously removed ticket that has a removed/cancelled reason code. If you try to reactivate one of these tickets, you will receive a message stating that the ticket cannot be activated, along with the removed/cancelled ticket code. You will, however, still be able to view the removed/cancelled ticket, as some of the information on the ticket (such as ticket weights) is not available outside of the standard reports.

You CANNOT reactivate a ticket from the Edit Orders & Tickets screen if it has an audit sequence number on it; however, if the plant was not set at the time of ticket cancellation/removal, the ticket can still be reactivated.

Updates

COMMANDseries has been updated to use the same rules that apply to removed tickets (where **REMOVE_RSN_CODE.TICK** is not null) to cancelled tickets (where **CANCEL_RSN_CODE.TICK** is not null) as well.

This modification relates to Greek Cancelled Ticket Print functionality, which allows users to cancel tickets with a reason code. Cancelled tickets are tickets that have concrete produced and are identified by populating the **CANCEL_RSN_CODE.TICK** field. These reason codes are the same codes that are used for Removing Tickets, which have flags that mark whether or not sales tickets should be included when:

- Creating Cartage Tickets
- Invoicing Tickets
- Creating Inventory Transactions
- Generating COMMANDexecutive Reports

COMMANDcartage has been modified as follows:

- Update Tickets now looks at the Cartage Flag on the Reason Code when updating Cancelled Tickets:
- If the Reason code is set to NOT create Cartage then Cartage Tickets are not created.
- If the Reason Code is set to Create Cartage then Cartage Tickets are created.

COMMANDinvoicing has been modified as follows:

- Preliminary Invoice Register and Invoice Print looks at the Invoicing Flag on the Reason Code when selecting Cancelled Tickets.
- If the Reason code is set to NOT Invoice, the system will ignore the ticket.
- If the Reason Codes is set to Invoice, the system will include the ticket.

COMMANDinventory has been modified as follows:

- Inventory Usage Update and Automated Usage Update Com looks at the Inventory Flag on the Reason Code when selecting Cancelled Tickets.
- If the Reason code is set to NOT Create Inventory then the system will not create inventory transactions for the ticket.
- If the Reason Codes is set to Create Inventory then the system will create inventory transactions for the ticket.

COMMANDexecutive has been modified as follows:

- Post Sales Data looks at the Flag on the Reason Code when selecting Cancelled Tickets.
- If the Reason code is set to NOT include in Exec Report the system will ignore the ticket.
- If the Reason Codes is set to include in Exec Report, the system will include the ticket.

HTML Document Format Interface

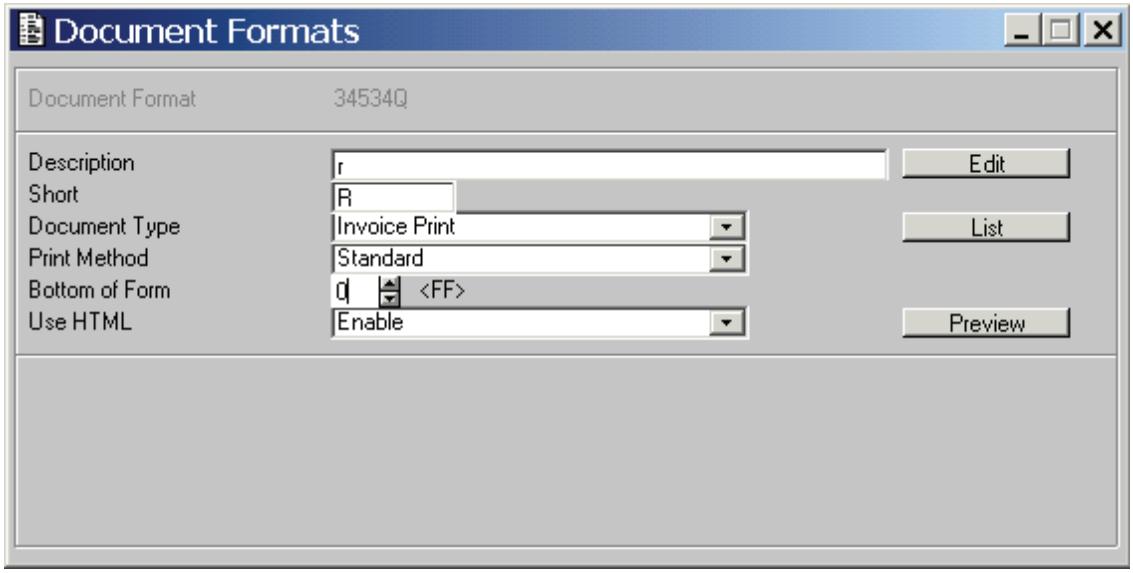
COMMANDseries now includes a built-in HTML editor to make it easier to incorporate HTML in document formats. The editor, TinyMCE, is an open source HTML editor, and is installed in the **`\BIN\tinymce`** folder.

The editor has been incorporated into the Document Format editor. If the document format is

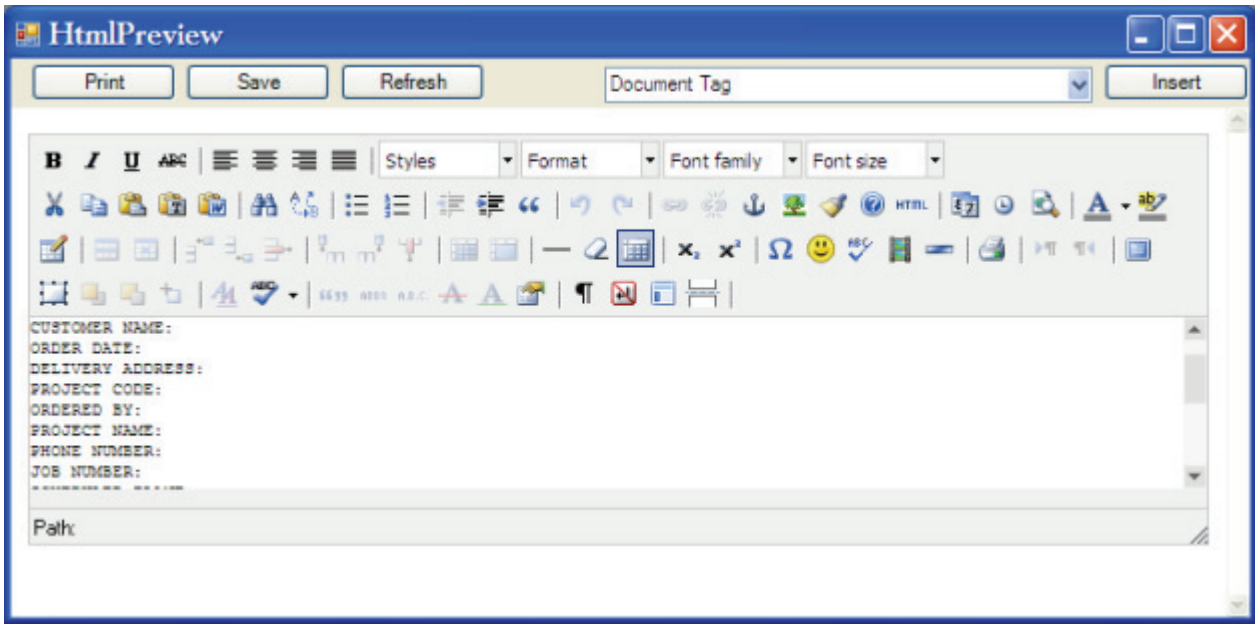
- Order Print & Data I/O
- Ticket Print & Data I/O
- Ticket Print

and the Print Method is **Standard** or **Overstrike**, a new field, **Use HTML**, will display:

Document Formats editor



If this field is set to **Enable**, the **Display** button will change to **Edit**. Pressing the **Edit** button will load the current document format into the HTML editor.



Documentation for TinyMCE is available at their website (http://tinymce.moxiecode.com/index.php).

Post-Production Out of Tolerance Loads

COMMANDseries has been updated to increase flexibility to process Out of Tolerance (OOT) loads after production and to not include them in manual or automatic Ticket Out;

as a result, these loads will not be sent to external third-party Quality or ERP systems. Instead, COMMANDseries will automatically cancel any tickets that have a **Weight Comply Status** of OOT. Batch Confirmation logic has been changed to automatically mark tickets as **`Canceled`** when the Weight Comply Status returned from the batch computer is OOT.

When an OOT load is received from the batch computer, the following actions will take place:

- The truck will be moved back to an In Yard status.
- The Price Quantity for the OOT ticket will be zeroed out.

If there is material still in the truck after an OOT load, the following actions still take place using standard COMMANDseries functionality:

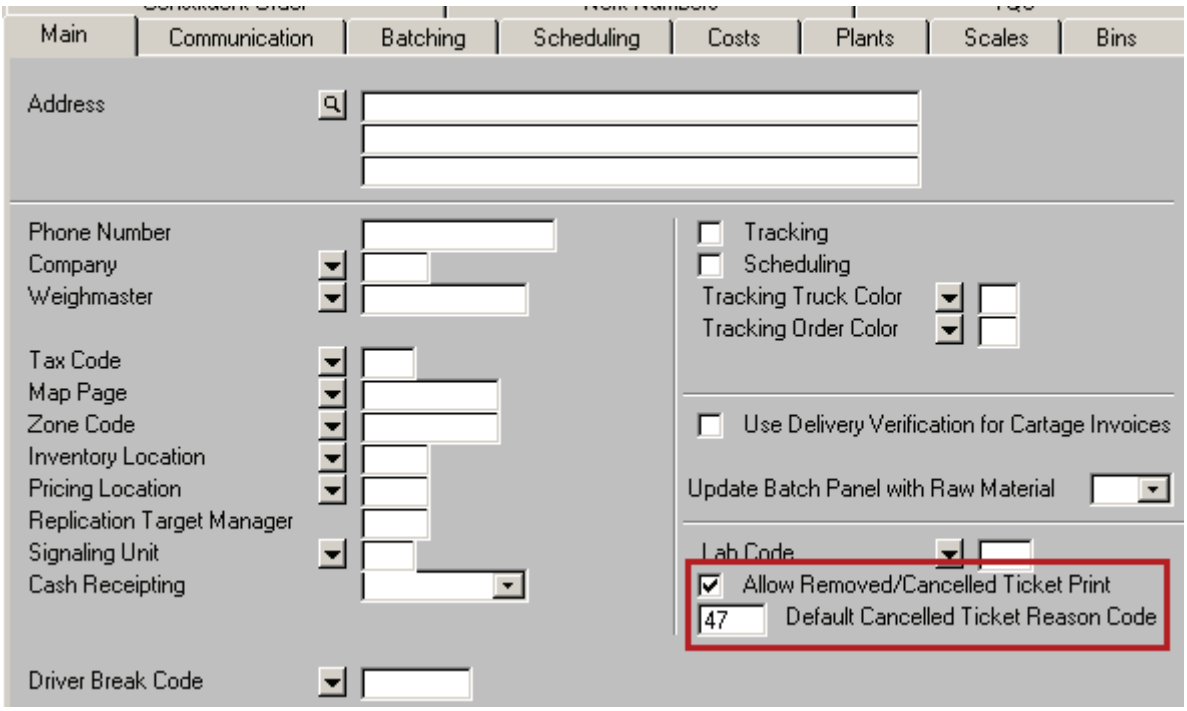
- You must manually enter the returned material that is in the truck if any or all of the material will be reused on future loads.
- Materials will be considered dumped unless the material is reused.

For delayed ticket prints, it is suggested that OOT load tickets include an indication that they are not to be shipped (i.e., omit the Customer Name on the ticket print). In other words, print these tickets using a different format and layout than the standard ticket print if desired.

Set Up

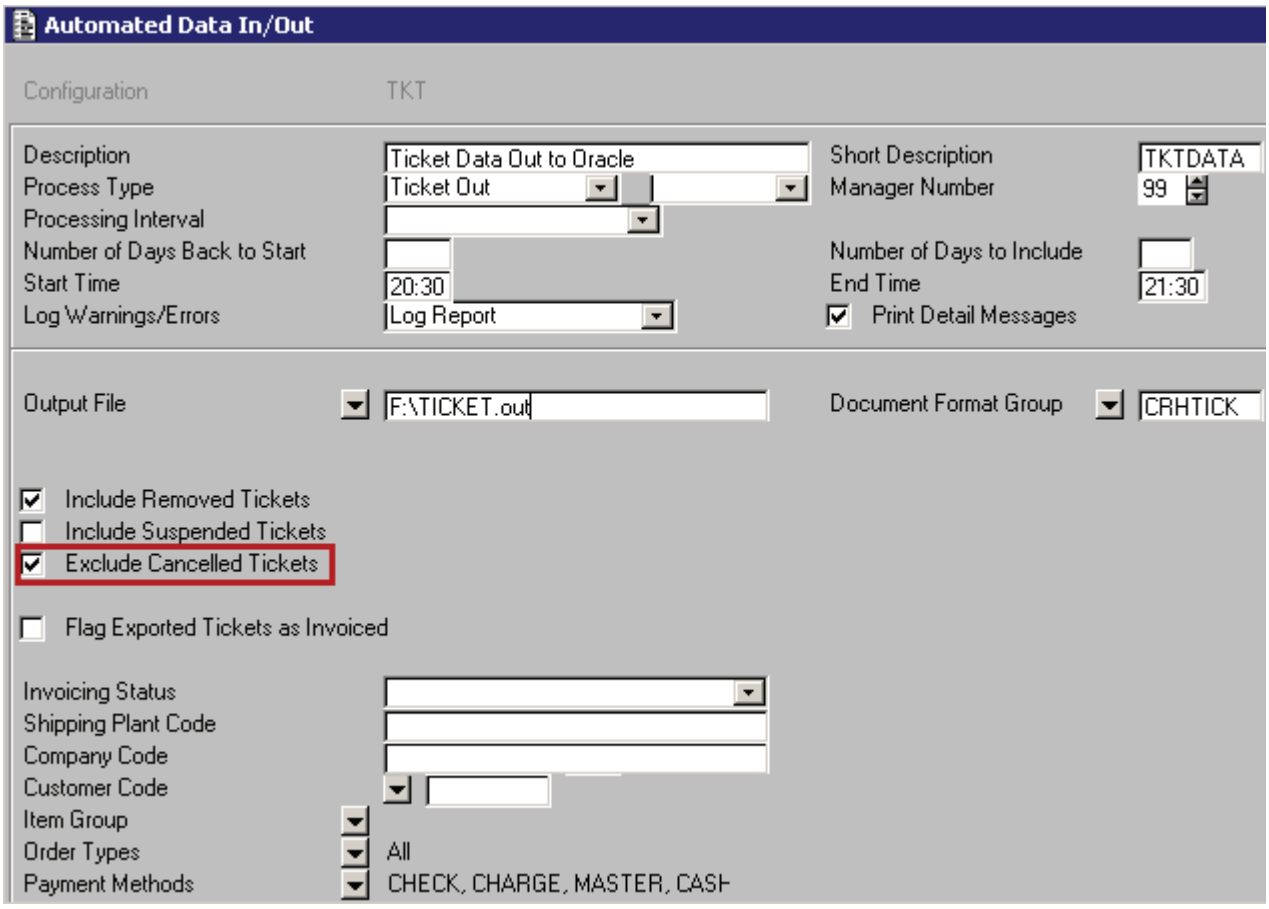
To accommodate this enhancement, a new **Allow Removed/Cancelled Ticket Print** field has been added to the Plants > Main tab. When selected, the **Default Cancelled Ticket Reason Code** field will display. Enter the Reason Code you wish to have associated with all automatically cancelled OOT tickets.

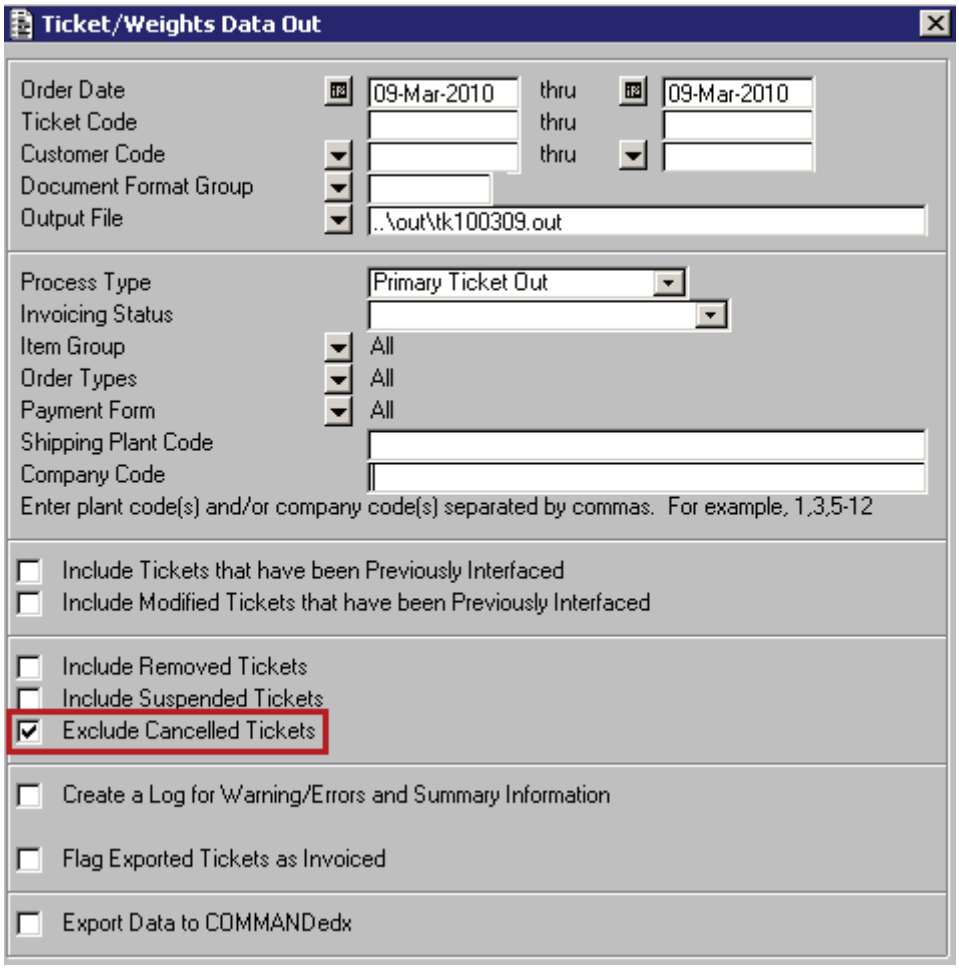
Plants > Main tab (EDTPLNT1)



Data In/Out

Automated Data In/Out and Ticket/Weights Data Out have been changed to include an **Exclude Canceled Tickets** option.


Automated Data In/Out
Configuration
TKT
Description
Ticket Data Out to Oracle
Short Description
TKTDATA
Process Type
Ticket Out
Manager Number
99
Processing Interval
Number of Days Back to Start
Number of Days to Include
Start Time
20:30
End Time
21:30
Log Warnings/Errors
Log Report
Print Detail Messages
Output File
F:\TICKET.out
Document Format Group
CRHTICK
Include Removed Tickets
Include Suspended Tickets
Exclude Cancelled Tickets
Flag Exported Tickets as Invoiced
Invoicing Status
Shipping Plant Code
Company Code
Customer Code
Item Group
Order Types
All
Payment Methods
CHECK, CHARGE, MASTER, CASH



- If **Exclude Canceled Tickets** is checked, the automated or manual ticket data out process will skip all tickets that have a Canceled Reason Code.

Print/Send Tax & Cement Info to Batching System

This modification allows the following information to be printed on tickets and passed to the COMMANDbatch/Generic 2 Way Interface:

- Max Water/Cement Ratio
- Min Cement Content
- CST - Customer Sales Tax Number
- TIN - Tax information Number

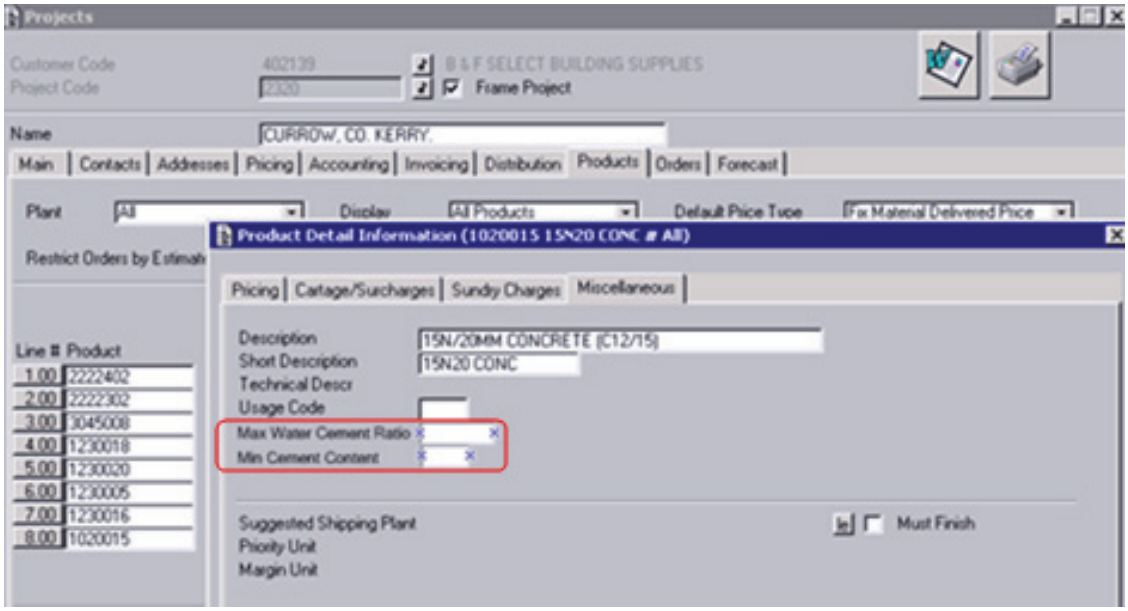
Setup

The goal in configuring this modification is to ensure that the correct field values will populate the appropriate fields without user intervention.

Project-Product Detail Information

The Project-level Product Detail Information screen has two new fields:

- Max Water-Cement Ratio
- Min Cement Content



Max Water Cement Ratio and **Max Cement Content** will be displayed and editable only if the related product is marked as a "Concrete Product".

Both values will default from the Item Master File (if available).

Customer & Project Accounting tabs

Previously, the Customer Accounting tab had a single **Tax ID Code** field. A second field has been added, **Tax ID Code 2**.

The Project Accounting tab has had both Tax ID Code fields added.

The labels can be changed as needed to more clearly identify a specific tax ID.

Data Out Tags

Support for the following Data Out tags has been added:

- Minimum Cement Content - MINCEM
- Maximum Water-Cement Ratio - MAXCEM
- Tax ID Code - TAXID
- Tax ID Code 2 - TAXID2

Record Sampled Tickets

Plant operators often prepare production samples of concrete mixes for quality control when a batch is completed or receive results from off-site testing. COMMANDseries has been enhanced to mark delivery tickets from which samples were taken, and to send this information electronically to the testing laboratory.

- CS will record the User ID of the person flagging the ticket as sampled, as well as the date/time the ticket was flagged as such on the **TKTL** (Ticket Line Information) table.
- You can update ticket information if needed in Edit Orders & Tickets; if you do so, a new record will replace the old one that was sent to COMMANDqc. However, once a ticket has been flagged as sampled and is saved, you cannot unmark the flag unless you have proper privileges.
- The existing interface between CS and COMMANDqc will recognize tickets that were flagged as sampled in CS. When a ticket is flagged as sampled in CS, the system will update or insert a new Batchwatcher (**BWGT**) record for that ticket. This record will be used to update COMMANDqc.

This feature does not include any information regarding fresh concrete test data (e.g., slump, temperature, air content, and the number of specimen prepared). This information will need to be manually recorded and transferred to the concrete lab where the test data can then be entered into COMMANDqc.

Set Up

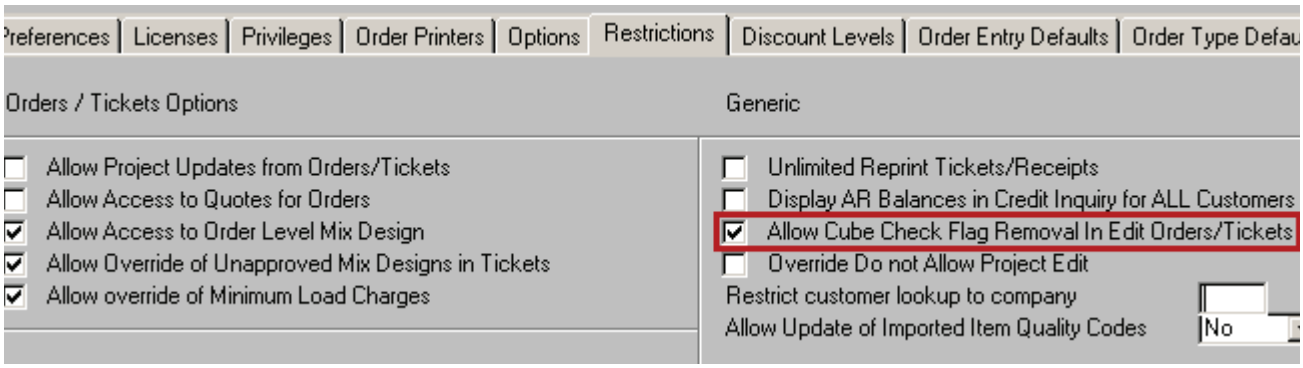
Configuring your system for Sampled Tickets involves changes in the following areas:

- Users editor
- Reason Codes editor

Users Editor

The first thing you should do is give any authorized personnel privileges to remove the **Cube Check** sampled flag from tickets. Go to the Users editor and select the new **Allow Cube Check Removal in Edit Orders /Tickets** flag on the Restrictions tab.

Users > Restrictions tab (EDTUSNMF)

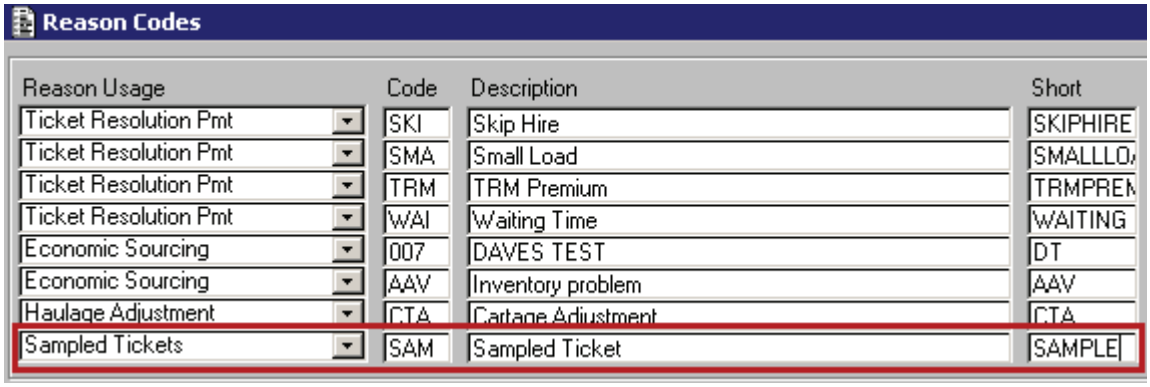

Preferences
Licenses
Privileges
Order Printers
Options
Restrictions
Discount Levels
Order Entry Defaults
Order Type Defau
Orders / Tickets Options
Allow Project Updates from Orders/Tickets
Allow Access to Quotes for Orders
Allow Access to Order Level Mix Design
Allow Override of Unapproved Mix Designs in Tickets
Allow override of Minimum Load Charges
Generic
Unlimited Reprint Tickets/Receipts
Display AR Balances in Credit Inquiry for ALL Customers
Allow Cube Check Flag Removal In Edit Orders/Tickets
Override Do not Allow Project Edit
Restrict customer lookup to company
Allow Update of Imported Item Quality Codes
No

If at any point a user removes the **Cube Check** flag from the ticket before saving, the recorded information (user name and date/time stamp) will be cleared from the TKTL file. **(What if the ticket is saved and then you clear the cube check field?)**

Reason Codes

Next, set up a new **Reason Usage** specifically used for **`Sampled Tickets`** on the Reason Codes editor. This Reason Code will be used in both Concrete Ticketing & Shipping and Edit Orders & Tickets when the **Cube Check** flag has been selected.

Reason Codes screen (EDTRSNC)



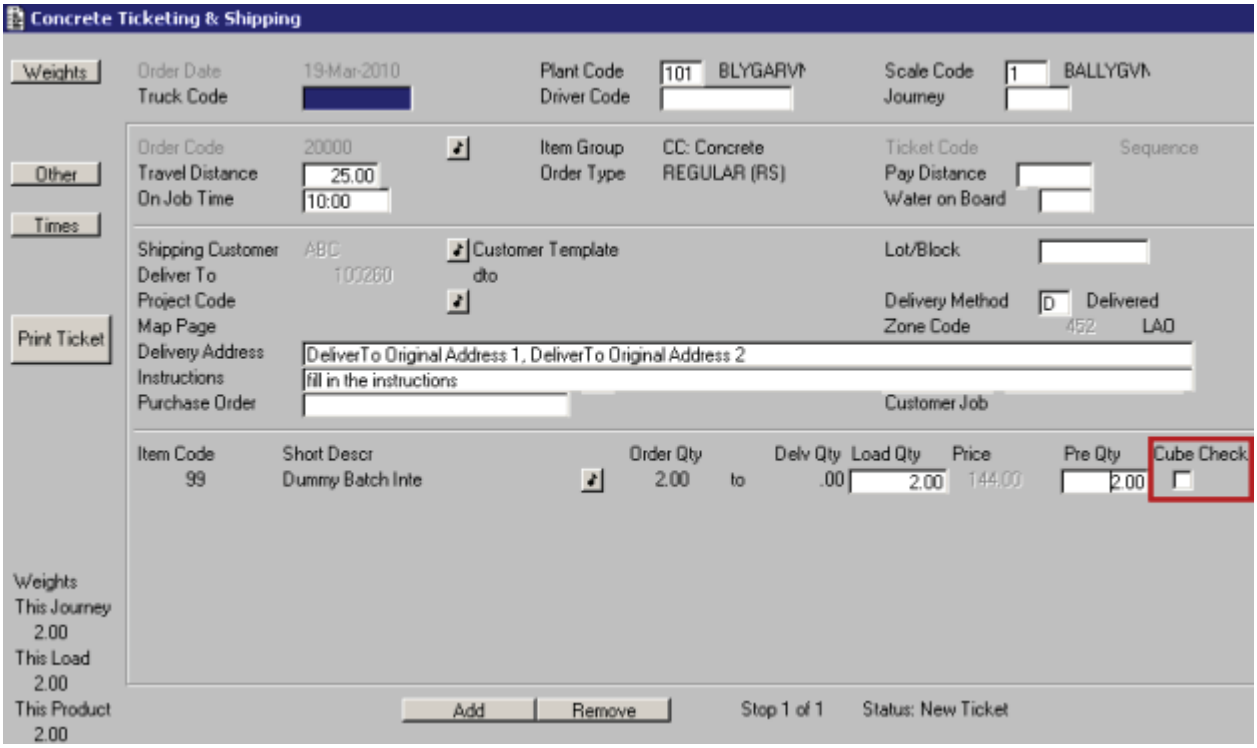
The Reason Code will not be interfaced to your third-party system upon export. In addition, it will not be available for editing after the ticket has been marked as invoiced.

Ticketing

Concrete Ticketing & Shipping

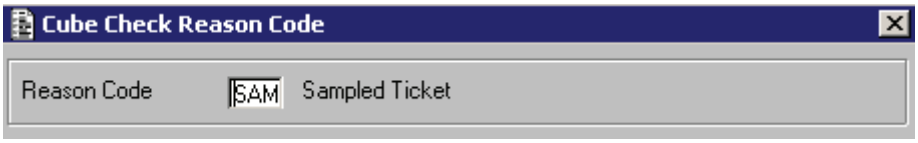
The Concrete Ticketing & Shipping form has been updated with the new **Cube Check** flag. Select this checkbox if the ticket contains a mix that is to be sampled.

Concrete Ticking & Shipping screen (EDTSHIP)



When you select the **Cube Check** box, you will prompted for a Reason Code:

Cube Check Reason Code (EDTSHIPB)

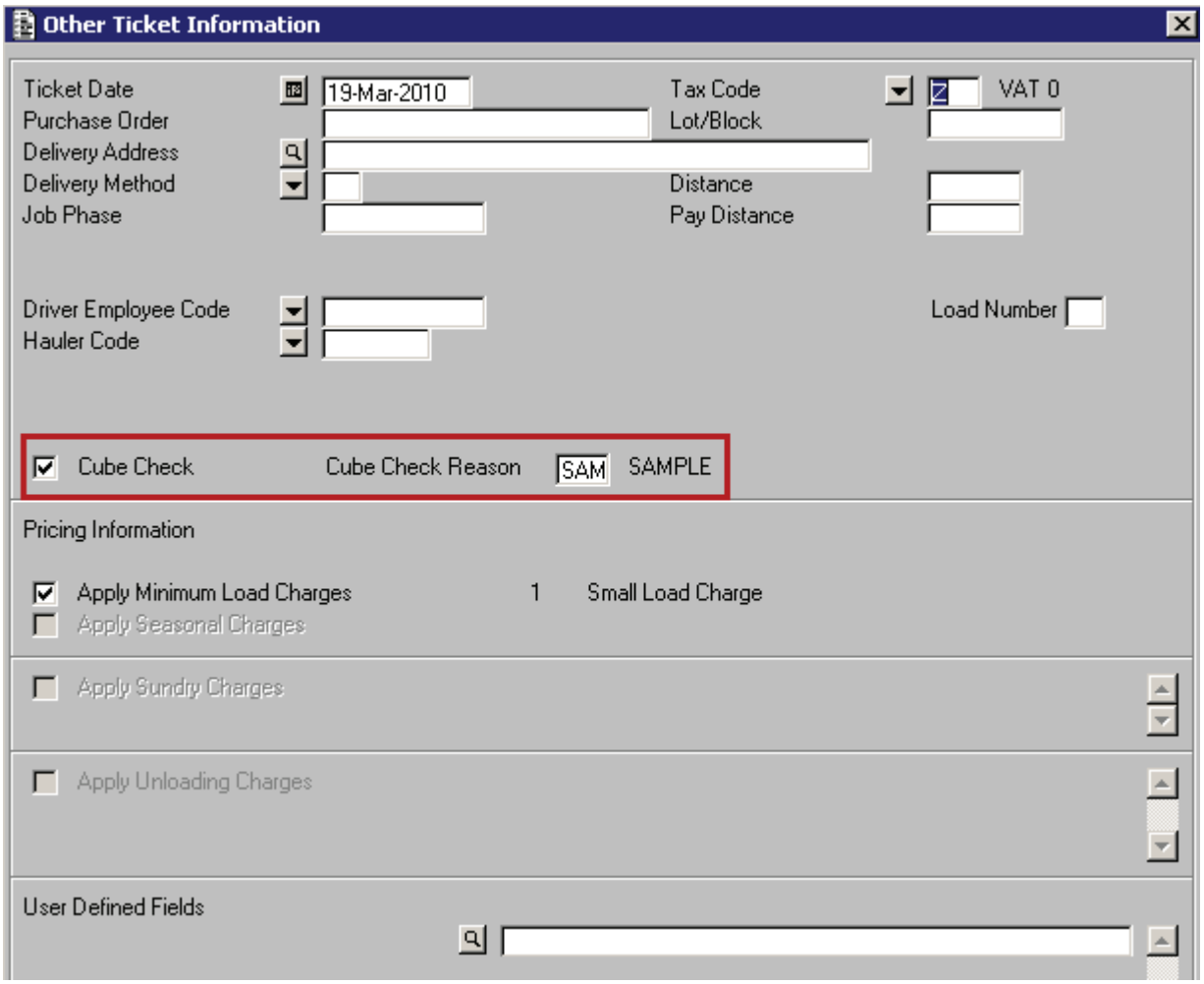


- The Reason Code entered on this screen must have a **Reason Usage** of **`Sampled Tickets`**.
- If you close the Cube Check Reason Code screen without entering a valid reason code, the **Cube Check** box will be cleared automatically.

Edit Ticket Information

The **Cube Check** flag has been added to the Other Ticket Information form in EditTicket Information (which is part of Edit Orders & Tickets). This will allow those users who do not have access privileges to the Concrete Ticketing & Shipping form due to the **Number of Days Back to Allow Dispatch** on the Configuration > Distribution tab to still be able to flag tickets as sampled.

Other Ticket Information screen (EDTPREPG)



The **Cube Check** flag will not be visible on any ticket that does not contain a Mix Product.

You must enter a **Cube Check Reason** when you select the **Cube Check** box.

- The Reason Code must have a Type of **`Sampled Tickets`**.
- If **Cube Check** is selected on this screen, you cannot save successfully unless you have entered a Reason Code.
- The Reason Code will not be available for editing on existing tickets if the ticket has already been invoiced. In this case, CS will interface the invoice information to mark the ticket as invoiced from your third-party system.

Database Fields

The below new fields have been added to the Ticket Line Information record (**`TKTL`**) to accommodate the information being stored and sent to COMMANDqc:

- **`CUBE_CHECK_USERNAME`**
- **`CUBE_CHECK_UPDATE_DATE`**
- **`CUBE_CHECK_REASON_CODE`**

The **CUBE_CHECK_USERNAME** and **CUBE_CHECK_UPDATE_DATE** fields can be retrieved through CS Data In/Out routines as well as standard database access tools. These two fields are not viewable on any form within the system. The **CUBE_CHECK_REASON_CODE** field is not retrievable or viewable on any form within the system.

Future-Day Ticketing

Overview

COMMANDseries has been updated to handle next-day concrete loads. Often, a dispatcher's working day ends before loads are delivered to customers. Therefore, dispatchers need the ability to schedule loads for the next day and print tickets so the truck can pick up its load and be sent for delivery before the dispatcher arrives to the office.

For documentation purposes, "pre-ticketing" refers to ticketing for the same day, while "future-day ticketing" refers to tickets that are created for a future date that is not the next day (for instance, an order for Monday morning is created on Friday).

- You can pre-ticket trucks for the current date, while the same truck can be future-ticketed for the next day. If the truck is already pre-ticketed for a next-day order, it cannot be pre-ticketed for another future-day order unless the truck is removed from the ticket.
- Only one future-day ticket is allowed per truck.
- You can future-ticket a truck even if the truck is on another non-future-day order.
- You can print/store the schedule's date and time for future-day orders.
- When the truck returns to an **At Plant** status, the next ticket will be loaded to the truck; the truck will not be punched out.
- You cannot punch out a truck when it is on any future-ticket or pre-ticket order. If you change the date for a future-ticket, you must punch the truck out and in again, otherwise the truck will not be assigned.
- When a truck is not on an order, the next ticket fields will be blank so the truck can be punched out. When the truck is punched in again, a future-day ticket will be assigned to the order if the current day matches a future date.
- Future-day tickets are delivered to the batch panel at the time the ticket is created. It is your company's responsibility to produce the ticket at the correct time.

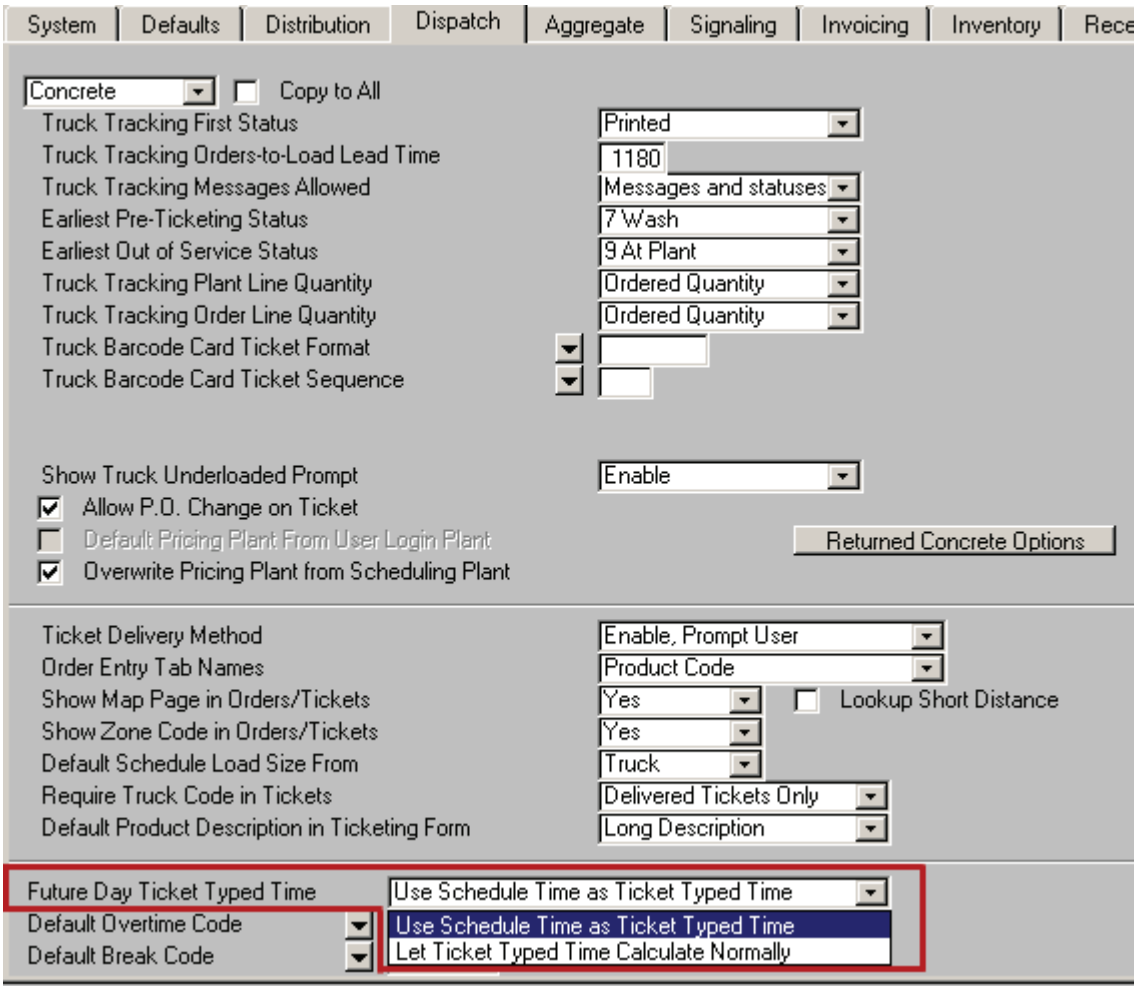
Configuration

The following will occur in Concrete Ticketing and Shipping if the Configuration > Dispatch tab's new **Future Day Ticketing Ticket Time** field is selected as **Use Schedule Time as Ticket Typed Time**:

- The **Order Date** from the Schedule Load (**SCHL**) is used for the Ticket Date field (**TKT_DATE.TICK**).
- The **Load Time** is calculated from the Scheduled Load time on the **SCHL** table and stored in the **SCHED_LOAD_TIME.TICK** field.

The **Typed Time** is calculated from the **SCHED_LOAD_TIME.TICK** field and stored in the **TYPED_TIME.TICK** field.

Configuration > Dispatch tab (EDTCNFXE)



If you select **Let Ticket Typed Time Calculate Normally** in this field, the Typed Time will be calculated when the ticket is actually entered in the system.

Generic 2-Way Batch and Middleware Interfaces

If the Configuration > Dispatch tab's **Future Day Ticket Typed Time** is **Use Schedule Time as Ticket Typed Time**, the following applies to users with Generic 2-Way Batch Interfaces and Middleware Batch Interfaces:

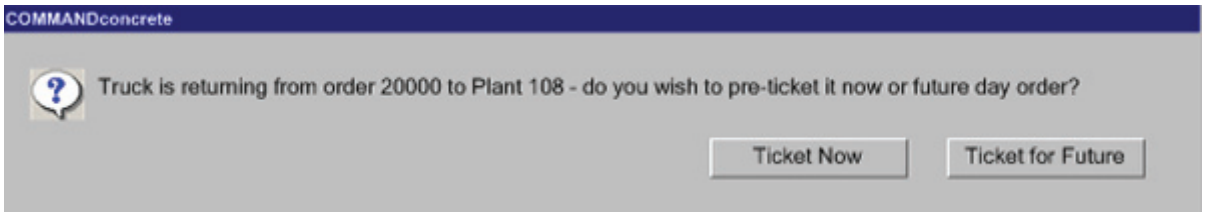
- The Ticket Date (**TKT_DATE.TICK**) is the same as the Schedule Date.
- The Schedule Load Time is based on the future day's Schedule (**SCHED_LOAD_TIME.TICK**).
- The Typed Time (**TYPED_TIME.TICK**) uses the same calculation as the Schedule Load Time.

Each time the truck code is removed from a ticket, the ticket will be removed from the batching system as usual.

Concrete Ticketing and Shipping

Concrete Ticketing and Shipping has been modified to display a dialog box when a truck is ticketed for a future-day order, asking you if you wish to print the ticket now or generate a future-day order. If **Ticket Now** is selected, the truck will not be punched back in.

- If the truck is on another ticket and the truck status is equal or greater than the **Earliest Pre-Ticketing Status** specified on the Configuration > Dispatch tab:


COMMANDconcrete
Truck is returning from order 20000 to Plant 108 - do you wish to pre-ticket it now or future day order?
Ticket Now
Ticket for Future

  If **Ticket for Future** is selected, the Earliest Pre-Ticketing Status is ignored.

Truck Punch In

The following new fields have been added to the Truck table (**TRUC**) to accommodate this enhancement:

- Future Ticket Code - **FUTURE_TKT_CODE.TRUC**
- Future Order Date - **FUTURE_ORDER_DATE.TRUC**
- Future Order Code - **FUTURE_ORDER_CODE.TRUC**

When a truck is punched in (via signaling, ticketing, Tracking & Scheduling Operations, etc.), the system will check to see if there are any **FUTURE** fields in the **TRUC** table. If information is found in the fields, the system will compare the future order date with the current date.

- If the current date is before the future date, the future fields will be cleared.
- If the current date is the same as the future order date, ticket information will be stored in the **NEXT** fields on the **TRUC** table, while the **LAST** fields on the **TRUC** table will display current ticket information.
- If the current date is later than the future order date, the future fields will be ignored.

Tracking and Scheduling

After a truck is ticketed for a next-day order, the truck is shown on the current day's Scheduling screen with the applicable ticket status for the current ticket, and in the **Truck Tracking First Status** (set up on the Configuration > Dispatch tab above) on the next day's Scheduling screen.

When the truck punches in, the system will check if a future order date exists. If it does, the **FUTURE** fields will be defaulted to the **LAST** fields on the **TRUC** table.

- The **Future Ticket Code** will be stored in the **Last Ticket Code** field on the **TRUC** table.
- The **Future Order Date** will be stored in the **Last Order Date** field on the **TRUC** table.

- The **Future Order Code** will be stored in the **Last Order Code** field on the **TRUC** table.
- The **FUTURE** order and ticket fields are cleared from the **TRUC** table after they are copied to the **LAST** fields.
- If the **Future Order Date** is not the same as the current **Order Date**, **Future** fields will not default to the **LAST** fields on the **TRUC** table.

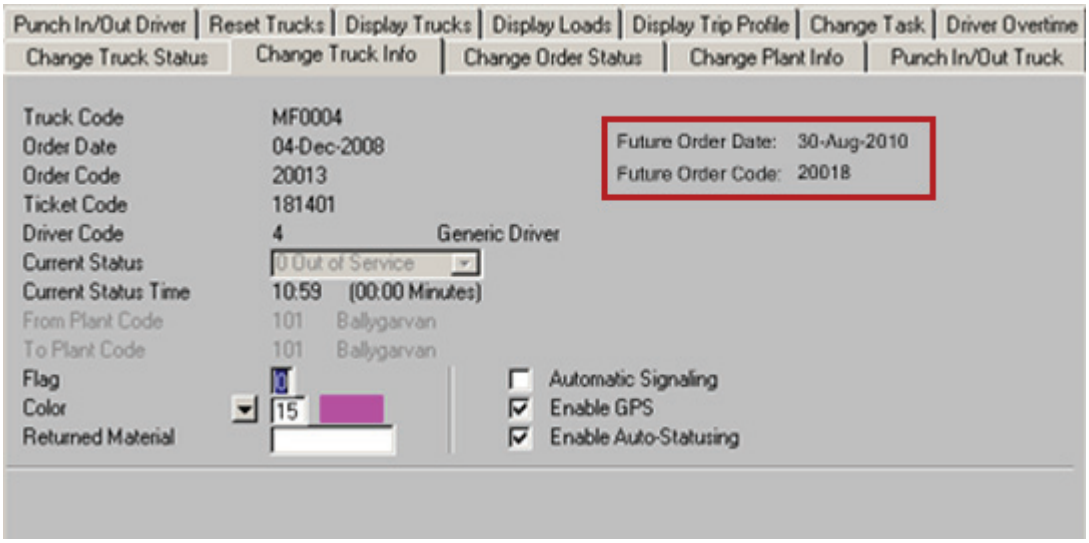
The truck will display on the current order, with the pre-ticketed order at the first status. Future-day orders will also display at the first status. You cannot move a truck from the first status to the next status on pre-ticketed or future-day orders.

Tracking and Scheduling Operations

Change Truck Info Tab

Future Order Date and **Future Order Code** have been added to the Change Truck Info tab. These fields are not editable and are for informational purposes only.

Tracking and Scheduling Operations > Change Truck Info tab (DBATSOPB)



Reset Trucks Tab

Future fields on the **TRUC** table will not be cleared if you press **Reset** on the Reset Trucks tab.

COMMANDfleet

COMMANDfleet has been updated to support future-day ticketing.

- Trucks display as future orders in Fleet.
- If a ticket is removed before the future date has arrived, it will be removed from the Fleet display as well.
- When a truck is punched in, the same fields are checked and processed by Fleet. This applies to Signaling as well.

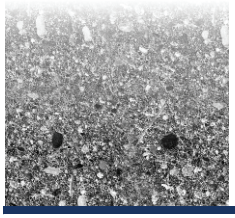
Print User-Defined Fields

The following Ticket Print document tags are used for pritnting any user-defined fields on the customer and project. The customer user-defined tags are used to print information from the order's shipping customer, as well as the order's billing customer.

- **BCUSDF** - Billing Customer User Defined Field. This tag retrieves the user-defined fields from the customer master table (**USER_DEFINED.CUST**) where the order's customer code is the same as the customer record's customer code (**CUST_CODE.ORDR** = **CUST_CODE.CUST**).
- **SCUSDF** - Shipping Customer User Defined Field. This tag retrieves the user-defined fields from the customer master table (**USER_DEFINED.CUST**) where the order's customer code is the same as the customer record's shipping customer code (**SHIP_CUST_CODE.ORDR = CUST_CODE.CUST**).

The project user-defined tag is used to retrieve the data from the project master record.

- **PRUSDF** - Project User Defined Field. This tag retrieves the user-defined fields from the project master table (**USER_DEFINED.PROJ**) where the order's customer and project codes are the same as the project record's customer code and project code (**CUST_CODE.ORDR** = **CUST_CODE.PROJ** and **PROJ_CODE.ORDR** = **PROJ_CODE.PROJ**).



Web/PDA Tickets and Orders for Trowel-Ready Mortar

Overview

CS08 has been updated to handle a new type of ticket import, Web/PDA tickets, which are used for Trowel-Ready Mortar (TRM) orders. TRM orders are those that are created when a driver carries multiple orders for multiple delivery addresses on a single truck. These orders are typically handled in real-time using a PDA.

Note: These orders differ from Journeys in that they deliver mortar, not concrete, aggregate, or concrete block. Additionally, in Journeys, order products can be different, whereas with TRM orders, the only product allowed is mortar.

The below explains how ordering and ticketing works when using a PDA for TRM:

- TRM orders must have a Truck Code.

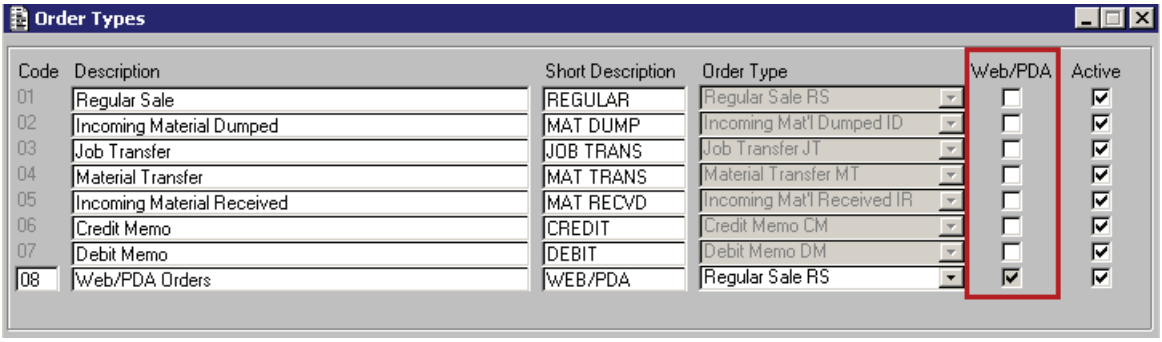
  Note: Orders that do not have a Truck Code will not be uploaded to your PDA.

- The Truck Code can be entered in either the Order Header or the Schedule Line based on the order set up in the Configuration editor.
- Once you logged in to COMMANDlog (the PDA ticketing interface) via your PDA, the mobile application calls the COMMAND Web Services application to retrieve the following order information: **Order Date**, **Order Code**, and the first item on the Order Line (**ORDL**) for the order.
- At this point, you may activate or void any open tickets on your PDA.
- At the end of the day, import your Web/PDA tickets back to COMMANDseries using Order and Ticket Data In.

Order Types

The Order Types screen has been updated with a new column: **Web/PDA**. Select this option for any order type you wish to designate as one that can be used on your PDA. Additionally, you can create a new order type specifically for Web and PDA orders, as shown below.

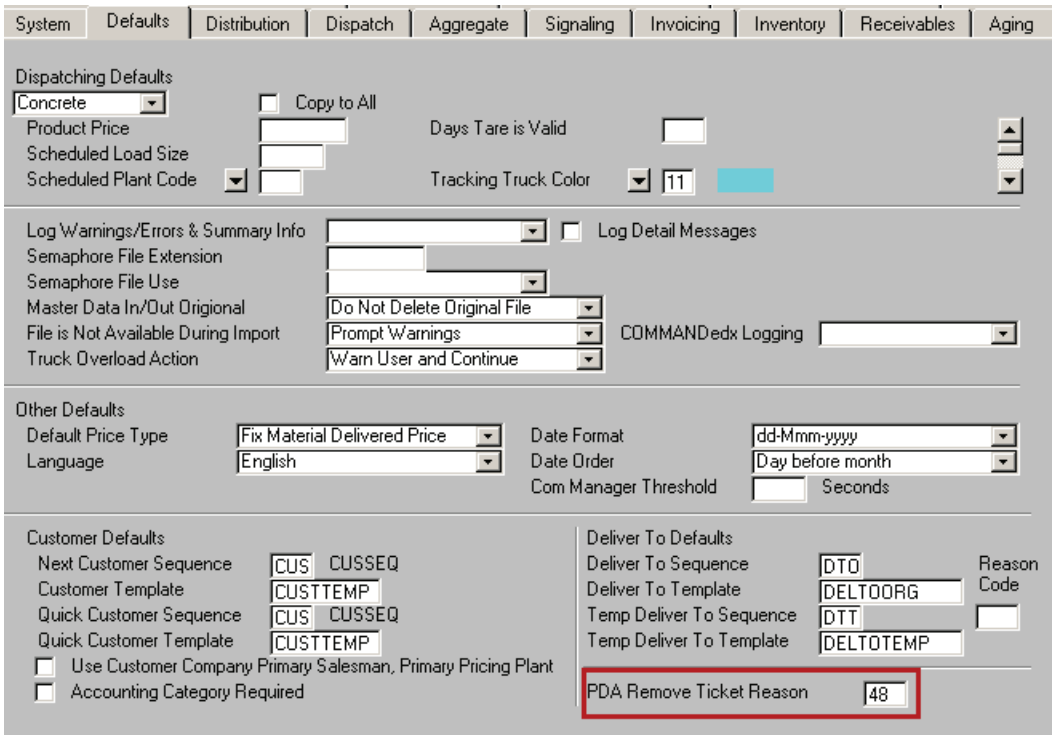
Order Types screen (EDTCFOT)


Order Types
Code
Description
Short Description
Order Type
Web/PDA
Active
01 Regular Sale REGULAR Regular Sale RS
02 Incoming Material Dumped MAT DUMP Incoming Mat'l Dumped ID
03 Job Transfer JOB TRANS Job Transfer JT
04 Material Transfer MAT TRANS Material Transfer MT
05 Incoming Material Received MAT RECVD Incoming Mat'l Received IR
06 Credit Memo CREDIT Credit Memo CM
07 Debit Memo DEBIT Debit Memo DM
08 Web/PDA Orders WEB/PDA Regular Sale RS

Configuration

Before you begin to download orders and tickets to your PDA, set a specific remove reason code for PDA tickets on the Configuration > Defaults tab. This reason code will be used for all tickets that are removed on your PDA.

Configuration > Defaults tab (EDTCNFXB)



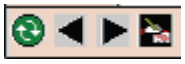
The COMMANDlog Interface

Logging In

Go to the COMMANDlog Logon screen on your PDA and enter your COMMAND Web Service **Username** and **Password**, as well as the URL for the **Server** you are connecting to. Once logged in, CS will interface with the COMMAND Web Services application.

Note: The image example above and for all other image examples may not reflect exactly what you see on your PDA. Icons may be different depending on the PDA you are currently using.

Toolbar

The toolbar  displays on every tab in COMMANDlog; however, certain icons display only on specific tabs.

- **Synchronize** - Synchronizes your PDA version of COMMANDseries with the COMMAND Web Service so that ticketing and order information is updated. Displays on the Summary, Orders, and Tickets tabs.
- **Log Out** - Prompts you with the message "Do you wish to log out and stop using the system?" Select **`Yes`** to log out or **`Cancel`** to return to the prior active tab. Displays on the Summary, Orders, and Tickets (when not in Create Ticket mode) tabs.
- **Previous** - Change the focus to the previous order or ticket. Displays on the Orders, Tickets, and Detail (when not in Create Ticket mode) tabs.

- **Next** - Change the focus to the next order or ticket. Displays on the Orders, Tickets, and Detail (when not in Create Ticket mode) tabs.
- **Create Ticket** - Begin creating a ticket. Displays on the Orders and Tickets tabs.
- **Void Ticket** - Mark an existing ticket as void. Displays on the Tickets tabs.

Summary Tab

Once you have successfully logged in, you will see the Summary tab, which displays the number of open orders and tickets in the mobile database, which resides on your PDA.

Order Tab

The Order tab displays a list of all orders (and the associated **Customer Name** and the first line of the **Ship To Address**) that are open in the mobile database. Tap on an order line to view the Detail tab for that order.

Each PDA is assigned to a specific Hauler. Only orders with the Hauler that has been assigned to your PDA will be downloaded.

Tickets Tab

The Tickets tab displays a list of tickets that have been created in the mobile database. From this tab, you can view the **Customer Name**, the local **Ticket Number** (tickets are numbered in order of delivery time, beginning with 1 for the first ticket of the day), **Quantity Delivered**, and the **Delivery Time**. Tap on a ticket line to display the associated Details tab.

Note: Delivery dockets for days prior to the current date are not available for viewing on your PDA.

The number of ticket dockets you can create and store at a given time is set on the Configuration screen within your PDA.

When you create a ticket from an order on your PDA, the system will perform two capacity checks:

- If the number of stored tickets is equal to or greater than the number set in Configuration on your PDA, the system will ask you to resynchronize before you can create another ticket.
- If the number of stored tickets is greater than the number set in Configuration minus 20, the system will warn you that you only have a certain number of tickets left for storage and will request that you resynchronize as soon as possible.

Once you have activated a ticket, you will be presented with a **Signature** area and **Accept**/**Cancel** buttons. Tap **Accept** to save the ticket record, update the delivered quantity on the order, and print a single-part delivery docket. This means that the delivery has been confirmed. Tap **Signature** to verify that the customer has accepted the terms of the ticket. Press **Cancel** to remove the ticket.

Note: The system will use the Order Code, Order Date, and Truck code, as well as data elements from tables that reference those fields to calculate auxiliary data such as Minimum Load Charges, Surcharges, and Cartage Charge/Pay Tables.

Note: A modified copy of the existing ticketing error handling component is created to log all PDA errors to the import log file.

Details Tab

The Details tab displays details of either an order or a ticket, depending on which option you have selected.

Controls

Below are a list of fields on the Details screen, depending on whether or not you are viewing an order or a ticket:

Orders

- **Order** - Order Number.
- **Customer** - Company name of the order's customer.
- **Address** - Shipping Address and City for the order.
- **Product** - Product Code and Short Description
- **Ord Qty** - Quantity ordered, along with the Unit of Measure (UOM).
- **Del Qty** - The quantity delivered, with the UOM. The sum of the Ticket Quantity for all saved tickets for the order.

Tickets

- **Tkt Qty** - Quantity of goods to be ticketed.
- **UOM** - Unit of Measure for the ticket.
- **Ticket #** - Ticket number. Maps to the `TKT_CODE.TICK` field in COMMANDseries.
- **Ticket** - Press this button to create a ticket ready for acceptance.
- **Void** - Press this button to mark an existing ticket as voided. Please note that tickets cannot be edited on your PDA, but they can be voided and re-ticketed.

You also have the following options on both the Order and Ticket tabs:

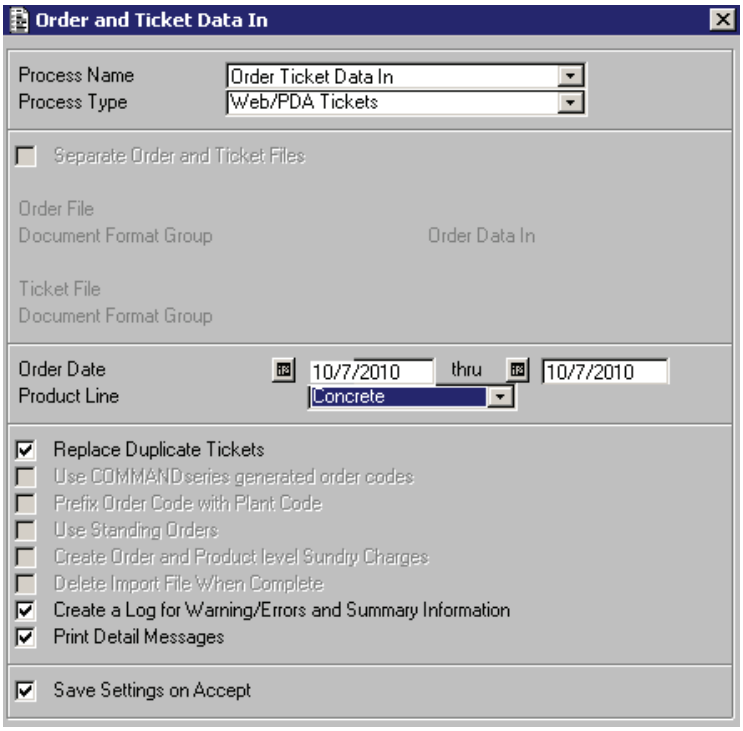
- **Signature** - The customer's signature as authentication of acceptance. It is your responsibility to verify that a legitimate signature has been entered before the ticket is accepted.
- **Accept** - Press this button to accept the shipment and the ticket, update delivery quantity, and/or print the delivery docket.
- **Cancel** - Press this button to cancel the proposed ticket.

Importing Tickets at the End of the Day

Order and Ticket Data In

Order and Ticket Data In has been modified to add an **Import Type** option for **`Web/PDA Tickets`**. Use this option to manually import tickets back to COMMANDseries.

Order and Ticket Data In (SELOTIN)



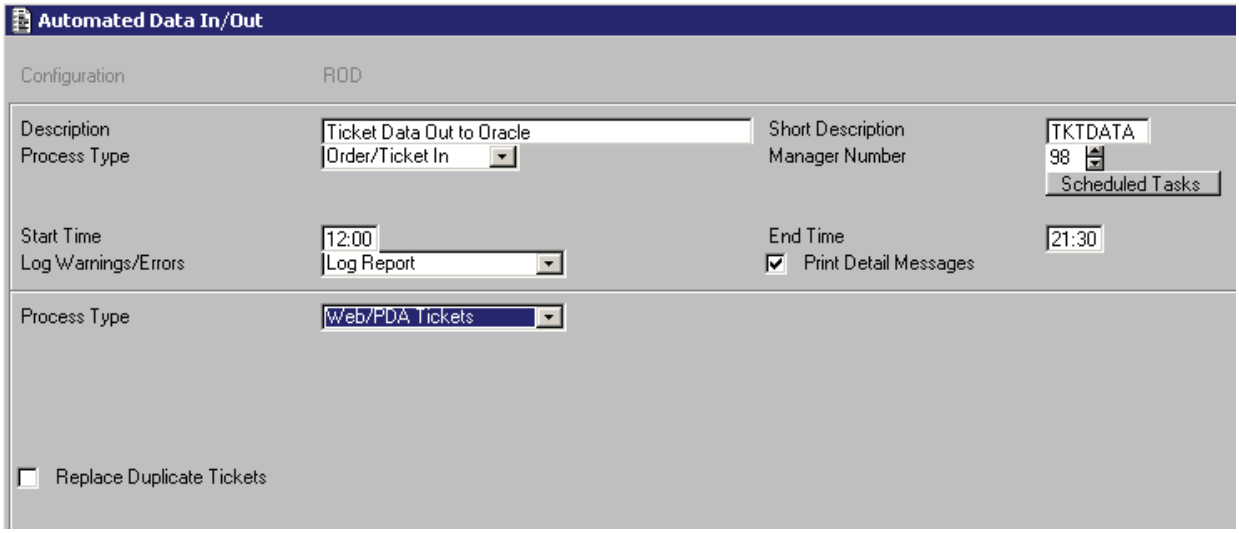
Ticket records are created when you import your Web/PDA tickets back to COMMANDseries:

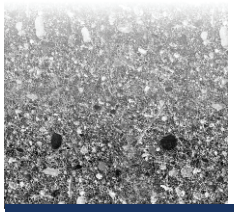
- Ticket line defaults are retrieved from the Order Line in COMMANDseries, based on the Order Date and Order Code from the PDA.
- Delivery Quantity is defaulted from the PDA.
- Ticket and ticket line records, minimum load charges, seasonal charges, surcharges, and sundry charges are created.
- Ticket Weights are created and Order Delivery Quantities are updated.
- The Shipping Plant is assigned where the load is completed.
- If tickets are voided in the PDA, they will still be created in COMMANDseries.
- Pricing for voided tickets is set to zero.

Automated Data In/Out

Automated Data In/Out for orders and tickets has been modified with a new Web/PDA Tickets option for the Process Type. When selected, only the Replace Duplicates Ticket option will be available for editing, with all other fields invisible. Use this option to have tickets import automatically at the end of each day.

Automated Data In/Out (EDTADIO)





Tasks, Conditions, and Driver Overtime

COMMANDseries contains a tool for managing and tracking a driver's clock time. This feature is comprised of a number of separate components that work collectively to bring together related information.

Topics in this section:

Tasks
Driver Overtime
Conditions
Tracking & Scheduling
Ticketing
Deadheading
Managing Driver Overtime
Time and Task Manager

Tasks

Tasks describe different functions to which a driver or truck can be assigned while on the clock. They are defined in the **Task Codes** screen {Files > Plant & Delivery Information > Task Codes}. The following are the default tasks; while additional tasks can be added, these default tasks cannot be deleted:

- On Load
- Deadhead
- Lunch
- Break
- Breakdown
- Shop
- In Service

These tasks are broken down in such a way as to make it easier to track time efficiency, particularly in tracking on-clock time not spent in delivery.

Driver Overtime

A dispatcher's job is to keep the trucks moving—even on a relatively calm day, it's difficult for a dispatcher to manage an entire fleet and also keep track of drivers who are getting close to qualifying for overtime. COMMANDseries now employs a Driver Overtime Table to

track a driver's on road hours, and to provide automatic warnings to dispatchers as the drivers get close to overtime wages. The task assigned to any given status determines how the system will classify that time.

The system can track three different types of overtime:

- **Daily** - Based on the hours worked during a single day.
- **Weekly** - Based on the number of hours logged during a calendar week.
- **Rolling** - Based on the number of hours a driver has spent on the road over a specified number of days. Unlike weekly overtime, rolling overtime looks at a specified number of days into the past—for example, for the past seven days.

Each driver can be assigned a Driver Overtime Table; the table specifies the allowed number of hours for the three overtime types. Enter or edit Driver Overtime Codes in the Driver Overtime editor {Files > General Information > Driver Overtime}. In addition, the table lets the user define alert hours. In other words, while a driver may hit daily overtime after eight hours, the system can alert the dispatcher when the driver hits six hours; this option gives the dispatcher the ability to adjust driver usage without having to look up clock information.

Conditions

In order to use the overtime information as an early warning system, there has to be a mechanism by which the dispatcher is notified that a driver is getting close to overtime. COMMANDseries uses conditions to trigger a number of warning mechanisms through the Tracking & Scheduling screen. The default conditions are:

- Daily Warning — The driver is approaching the limit for overtime.
- Daily Max — The driver is now drawing overtime.
- Weekly Warning
- Weekly Max
- Rolling Warning
- Rolling Max
- Deadhead

These default conditions cannot be deleted.

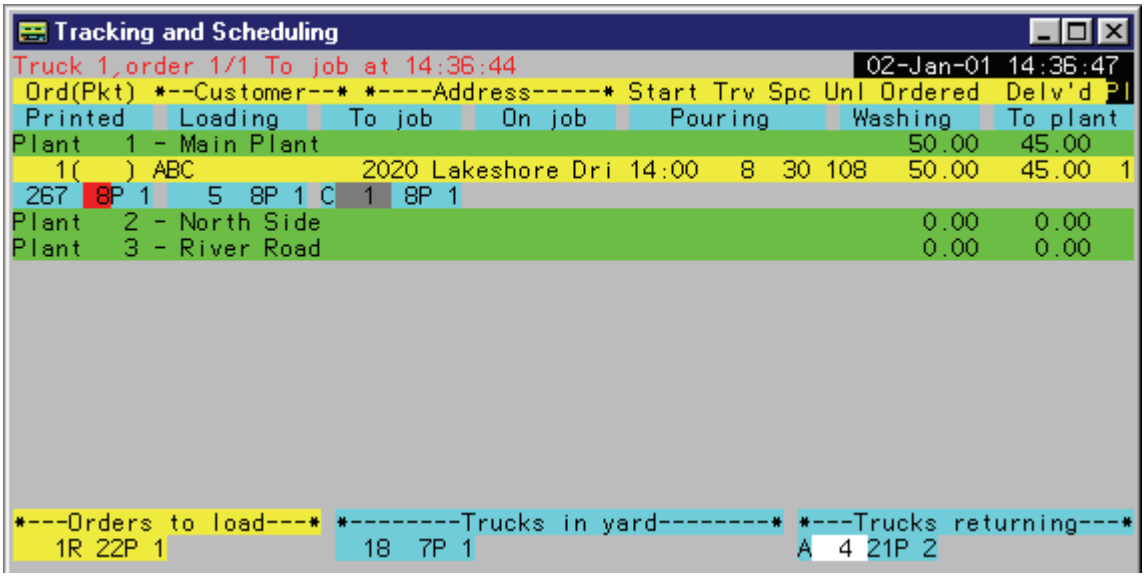
Drivers enter into the overtime-related conditions when the flagged time reaches limits specified in their assigned Driver Overtime Table. All other conditions—such as deadhead time—are linked to driver tasks. Enter or edit Condition Codes in the Condition Codes editor {Files > Plant & Delivery Information > Condition Codes}.

Each condition can be tied to different manners of display on the Tracking screen. A condition can change the color of a truck token, add a flag at the beginning of that token, or both.

Tracking & Scheduling

All of these features come together on the Tracking and Scheduling screen to provide the dispatcher with a clearer picture of fleet operations and status. In the following screen, there are three truck tokens that do not have the standard token appearance.

Tracking and Scheduling Screen


Tracking and Scheduling
Truck 1,order 1/1 To job at 14:36:44
02-Jan-01 14:36:47
Ord(Pkt) *--Customer--* *----Address-----* Start Trv Spc Unl Ordered Delv'd Pl
Printed Loading To job On job Pouring Washing To plant
Plant 1 - Main Plant
50.00 45.00
1( ) ABC 2020 Lakeshore Dri 14:00 8 30 108 50.00 45.00 1
267 8P 1 5 8P 1 C 1 8P 1
Plant 2 - North Side
0.00 0.00
Plant 3 - River Road
0.00 0.00
---Orders to load---
1R 22P 1
--------Trucks in yard--------
18 7P 1
---Trucks returning---
A 4 21P 2

Here's how to read the warning colors on this screen (keep in mind that colors and flags are user-defined):

- Truck 267, currently assigned to Order #1, has had its ticket printed, but for some reason it has not moved to Loading status. Notice that the timer portion of the truck token has turned red to alert the dispatcher that this load is falling behind schedule. This feature is part of Tracking & Scheduling functionality, and is not influenced by tasks or conditions in any way.
- The driver of Truck 1 is approaching the limit for weekly overtime. A flag (**C**) has been added to the beginning of the token, and the color of the truck number has changed (In the previous example, the timer portion of the token changed color).
- Truck 4 is being deadheaded to plant 2. There is a flag (**A**), the truck color has changed, and the timer shows the time until the truck arrives at plant 2.

Ticketing

The ticketing procedure is unchanged. On the Ticketing screen {Dispatch > }, whenever a truck is ticketed the system retrieves the driver's clock time to date and compares it to the information saved in the assigned driver overtime table. If the driver's current time is under the specified limit and the projected trip time for the new load does not put the driver into the warning level, the load will ticket normally.

If the driver's hours are over the limit for rolling overtime, or the trip will put the driver over the limit, then a warning displays when the load is ticketed:

```
Driver on Truck 1 will exceed rolling overtime maximum
before this trip has been completed. Do you want to use this
truck?
```

If the dispatcher selects **Yes**, the truck will be ticketed as usual. If the dispatcher selects **No**, they will be returned to the Ticketing screen to select another driver.

Overtime button. This button provides the dispatcher a convenient means of checking the clock status of any driver during the course of the day.

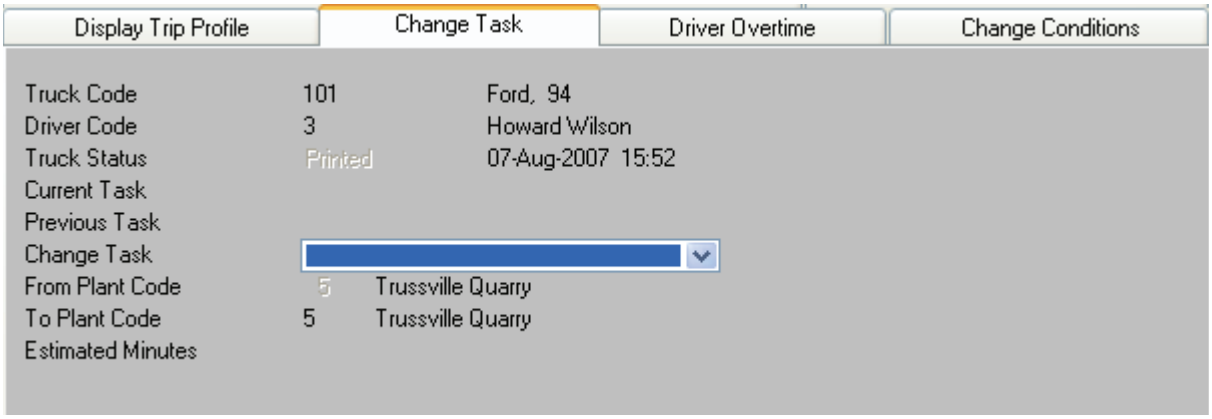
Deadheading

Dispatchers can conveniently deadhead a truck from one plant to another. For a truck to be eligible to be deadheaded, it must be clocked in and not assigned to another delivery load.

To deadhead a truck:

1. On the Tracking & Scheduling screen, right-click the truck to be sent to another plant and choose Change Tasks.
   --or--
   Open the Tracking & Scheduling Operations screen {Dispatch > Tracking & Scheduling Operations}, select the **Change Task** tab, and enter the appropriate **Truck Code**.
2. Select **Change Truck Task** from the popup menu.
3. On the screen that appears, select **Deadhead** from the Change Task drop-down menu.

Tracking & Scheduling Operations – Change Task Tab (DBATSOPK)



4. The truck's current plant will default into the **From Plant Code** field. Enter the plant to which the truck is being sent in the **To Plant Code** field.
5. Enter the **Estimated Minutes** to travel to the new plant. If the system has map pages entered, the travel time can default from the appropriate map page.

   Map pages are assigned to plants in the Plant file. The map page must contain travel times from the origination plant to all other plants.
6. Accept the screen. On the Tracking and Scheduling screen, the truck token will move to the **Trucks returning** section. The arrival timer will indicate the entered travel time. The truck code on the token may change color, or there may be a flag in front of

the truck code, or both—depending on system configuration. The plant code at the end of the token will reflect the new plant.

7. When the truck arrives at the new plant, end the deadhead task by dragging and dropping the truck into the **In Yard** section of the Truck Tracking screen. The Deadhead condition color and/or flag will disappear from the token. (Another way to do this is to access the Tracking and Scheduling Operations screen and select End Task.)

Changing a truck's assigned plant by deadheading is a temporary change. When trucks are reset at the end of the day, the truck will be returned to its original plant. If a truck is to be assigned to a plant for more than a single day, change the truck's permanent plant assignment in the Truck file.

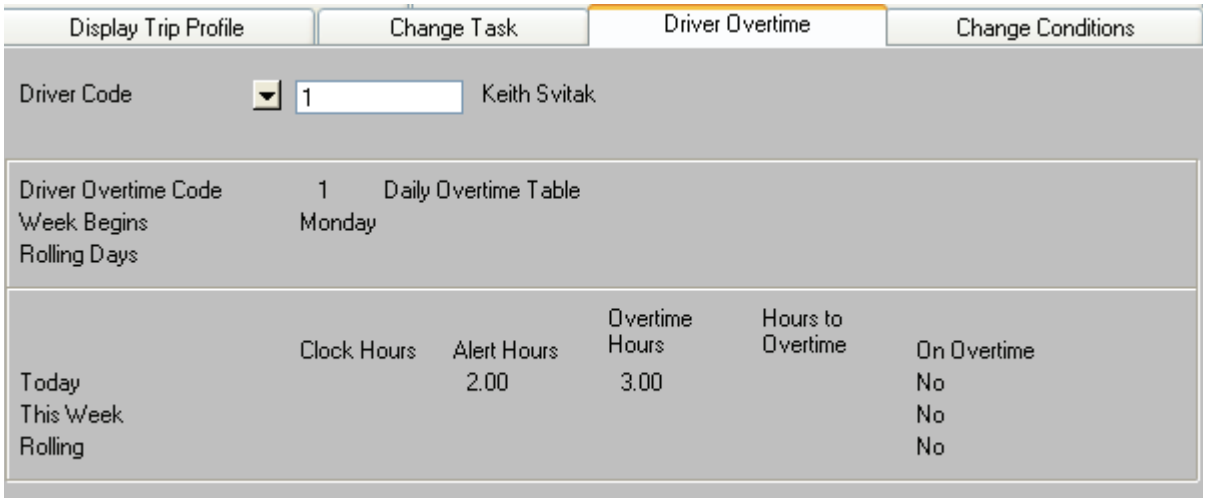
Managing Driver Overtime

COMMANDseries uses conditions to alert dispatchers when drivers approach overtime limits. The system also allows dispatchers to check a driver's hour status at any time.

To check a driver's overtime status:

1. Right-click on the truck token to which the driver is assigned on the main Tracking and Scheduling screen. Select **Driver Overtime** from the popup menu.
   --or--
   Open the Tracking & Scheduling Operations screen {Dispatch > Tracking & Scheduling Operations}, select the **Driver Overtime** tab, and enter the **Driver Code.**
2. The overtime-related information for the driver will appear on the screen.

Tracking & Scheduling Operations – Driver Overtime Tab (DBATSOPL)



3. This information is for reference only; it cannot be edited from this screen. To edit driver or truck task times, use the **Time and Task Manager**.

Time and Task Manager

The **Time and Task Manager** provides a practical means of reviewing and editing time and task information for trucks and drivers. This tool lets you go back and correct information, or fill in missing information.

Topics in this section:

Editing Ticket Times

Editing Truck Times

Editing Driver Times

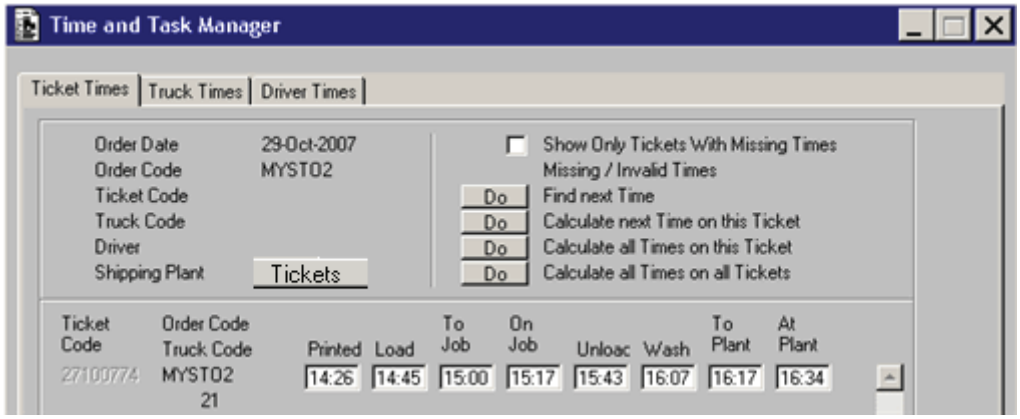
Editing Ticket Times

To edit ticket times for a specific order:

1. Open the **Time and Task Manager** {Dispatch > Time Analysis > Time & Task Manager}.
2. Enter the **Order Date**.
3. If you want to retrieve tickets associated with a specific order, enter the **Order Code**.
4. If you are interested in a specific driver or ticket, enter the appropriate codes. To view all tickets for an order, simply tab through the **Ticket Code**, **Truck Code**, **Shipping Plant**, and **Driver** fields without entering anything.
5. The system will retrieve all tickets attached to the order.

   Canceled or removed ticket are marked with a small hyphen to the right of the Ticket Code.

Time and Task Manager (EDTTMGRA)



   The large area at the bottom of the screen shows the tickets and ticket status times.
6. For particularly large orders, you can check the **Show Only Tickets With Missing Times** checkbox to restrict the number of tickets displayed.
7. Press the **Tickets** button to retrieve tickets. If no plant code has been entered, the system will use the plant code specified for you in the User > Plants tab.
8. To edit a specific ticket's times, click the ticket's status field and enter the correct time using one of the COMMANDseries standard formats. Tab to move to the next field.

   If the existing data on a ticket is correct, but there are one or two missing fields, select **Calculate all Times on this Ticket/Calculate all Times on all Tickets** checkbox. Based on the existing data and the schedule information, the system will extrapolate the missing data. (This option can also be performed on all tickets.)

9. Once the necessary corrections have been made, **accept** the screen to save the changes.

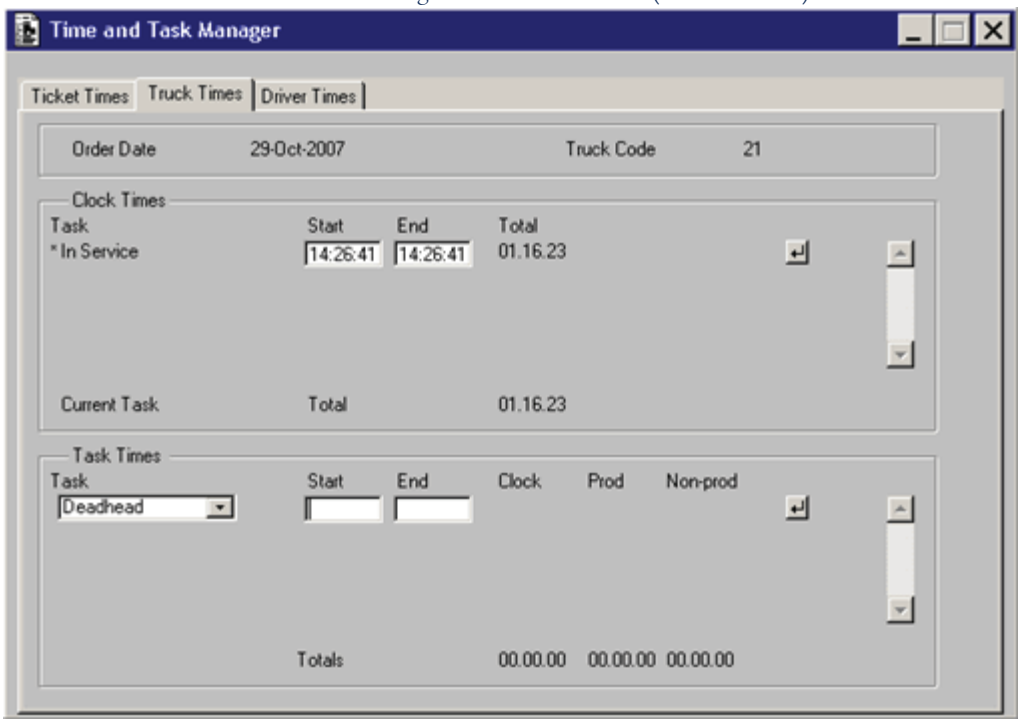
Editing Truck Times

In most cases, one driver stays with the same truck all day long. Consequently, a truck's times match the driver's times; however, if a driver's times are edited, it may be necessary to edit the truck's times as well.

To edit a truck's times in the Time and Task Manager:

1. Select the **Truck Times** tab.
2. Enter an **Order Date**.
3. Enter a **Truck Code**, or detail in the field to display a list of trucks. Once these two values are entered, the times for the truck will be displayed.

Time and Task Manager - Edit Ticket Times (EDTTMGRB)



4. Edit **Clock Times** as necessary. Use the **Add Occurrence** button to add **In Service** events.
5. Edit **Task Times** as necessary.
6. To delete a task, select the task and press <F5>.
7. To add a task, select the task you wish to precede the new task, and press <F6>. The new task field will appear. Select a specific task from the drop down list, and edit the task times as needed.

   The **Add Occurrence** button (or <F6>) will create a task after the currently selected task. **Insert Occurrence** (<Shift+F6>) will create a task before the currently selected task.
8. **Accept** the screen to save the changes, or proceed to another tab.

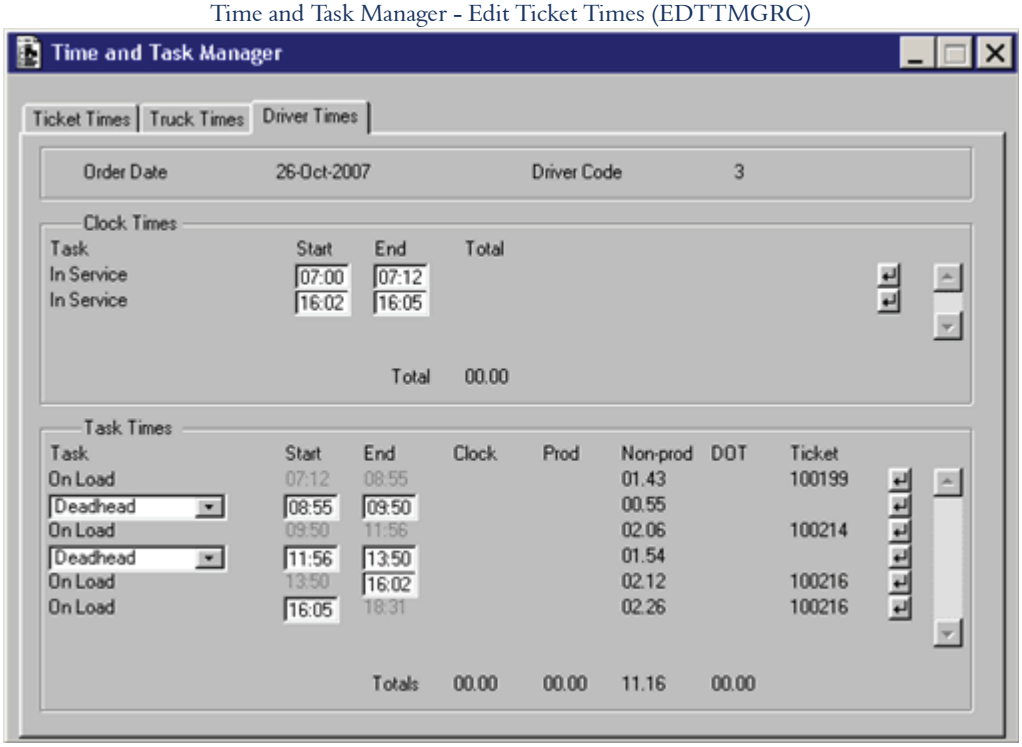
Editing Driver Times

Accurate recording of driver times is critical to the proper reporting of driver overtime.

To edit a driver's times in the Time and Task Manager:

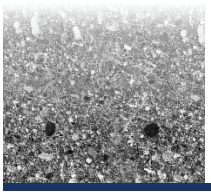
1. Select the **Driver Times** tab.
2. Enter an **Order Date**.
3. Enter a **Driver Code**, or detail in the field to display a list of drivers. Once these two values are entered, the times for the truck will be displayed.

Time and Task Manager - Edit Ticket Times (EDTTMGRC)



4. Edit **Clock Times** as necessary. Use the **Add Occurrence** button to add **In Service** events.
5. Edit **Task Times** as necessary.
6. To delete a task, select the task and press <F5>.
7. To add a task, select the task you wish to precede the new task, and press <F6>. The new task field will appear. Select a specific task from the drop down list, and edit the task times as needed.
8. **Accept** the screen to save the changes, or proceed to another tab.

Selecting the **Add Occurrence** button or <F6> will create a task after the currently selected task. **Insert Occurrence** or <Shift+F6> will create a task before the currently selected task.



Preliminary Invoice Register

The Preliminary Invoice Register is your primary price reviewing tool. It has a variety of options that let you generate price information in a way that will best suit your business practices.

The Preliminary Invoice Register Selection screen actually provides access to two different reports: the Priced Orders Report and the Preliminary Invoice Register. What's the difference between a Priced Orders Report and a Preliminary Invoice Register? When you physically look at the reports, they look pretty similar.

The answer is the difference between orders and invoices. The Priced Orders Report gives you pricing information on an order-by-order basis. It does not take into account any invoice settings a specific customer or project may have. You get one major report division for each order.

The Preliminary Invoice Register, on the other hand, simulates an invoice run. It takes into account customer and project-level invoice settings, and gives you one major report division for each would-be invoice. If a project or customer is set to invoice by Project/Customer, or Order/PO, or anything other than by orders, you may see multiple orders "invoiced" together, sometimes in an order that makes pricing review more difficult.

Either report can be used for pricing review. If you invoice everything by order, it doesn't matter which report you use. If you do have some variety in your invoicing configurations, you may want to work with both and see which suits your company's business practices best.

The Transfer Orders Register is not directly related to the invoicing process, but is used to ensure that internal material use is properly tracked.

Topics in this section:

Saving Report Configurations
Printing a Priced Orders Report
Printing an Exceptions Report
Exception Items Only Option
Printing a Preliminary Detail Invoice Register
Transfer Orders Register

Saving Report Configurations

Several of the more complicated reports give you the option to save individual report configurations. Rather than enter each configuration option every time you need to run a report, you can save commonly used configurations for repeated use. Once a report

configuration has been saved, it can then be recalled, at which point you will only need to add some additional information, such as data ranges.

To enter/save a report configuration:

1. Open the report selection screen. If configurations for the report can be saved, the first field on the selection screen will be **Report Name**. If that field is not present, then custom configurations for that report cannot be created.
2. In the **Report Name** field, enter a name that will identify the configuration. The name can be up to 40 characters in length.

   When you go back to select a **Report Name**, you will select from a list of all stored configurations in the system, not just those you have entered. So make sure you enter a name that you will easily be able to identify.
3. Enter the rest of the report options.
4. Mark the **Save Settings on Accept** checkbox.
5. **Accept** the screen to run the report. The configuration will be stored for future use.

To use a saved report configuration:

1. Open the report selection screen.
2. Select the desired report from the **Report Name** drop-down list.
3. Press <Tab> to leave the the **Report Name** field. The configuration for the selected report name will be loaded into the selection screen.
4. Make any needed changes to the selection screen.
5. **Accept** the screen to generate the report.

To delete a report configuration:

1. Open the report selection screen.
2. Select the desired report from the **Report Name** drop-down list.
3. Press <Tab> to leave the **Report Name** field. The configuration for the selected report name will be loaded into the selection screen.
4. Press <Shift-F5> or the **Delete** button on the COMMANDseries toolbar. A confirmation box will ask if you really want to delete this record.
5. Select **yes** to delete the record. The record will be deleted and the selection screen will close.

Printing a Priced Orders Report

Use the Priced Orders Report to obtain pricing information for orders and tickets being prepared for invoicing. This report option lists and totals each order separately, whereas the Preliminary Invoice Register Option groups and totals orders and tickets as they will be invoiced (based on individual customer settings).

This report includes important prices and pricing-related information, such as zone code, project pricing plant, and the price source code. It also shows the delivery zone for each

order, which can influence the price. Suspended Orders can also be seen on the Priced Orders Report.

The Priced Orders Report has one option, the Exception Report, that is not available from the Preliminary Invoice Register.

To print a Priced Orders report (without exceptions):

1. Go to the **Preliminary Invoice Register Selections** screen {Invoicing > Preliminary Invoice Register}.
2. Enter a **Report Name** to save a new report configuration, or select an existing Report Name from the drop-down list. This field can be left blank.
3. In the **Report Type** drop-down list, select **Priced Orders**.
4. Select an option from the **Report Sequence** list to indicate the sequence in which invoice information will appear. These sequences are particularly useful if multiple people participate in the price review process.
5. Select the **Product Line**. Options are:
   - All Orders
   - Concrete
   - Aggregate
6. Select the **Order Type**s to be included. This option is helpful if you want to process credit and debit memos separately from regular sales. The options are:
   - Regular Sale
   - Incoming Material Dumped
   - Credit/Debit Memos
   - All
7. Select the **Payment Method**. The options are:
   - Charge
   - Cash
   - Check
   - Credit Card
   - All

   Many companies prefer to process their COD transactions separately.
8. Enter the **Invoicing Status** that will be included on the Preliminary Invoice Register. This field allows to differentiate between released and suspended orders/tickets. The default is All.
9. Enter the **Order Date** to specify the date or range of order dates to include on the Priced Orders Report. This field is required.
10. Enter a **Billing Customer** or range of billing customers to include on the Priced Orders Report. If the field is left blank, Billing Customer will not be used for record selection.
11. Enter a **Project Code** or range of projects to include on the Priced Orders Report. If the field is left blank, Project Code will not be used for record selection.

12. Enter an **Accounting Category** or range of accounting categories to include on the Priced Orders Report. If the field is left blank, Accounting Category will not be used for record selection.
13. Enter a **Company** or range of companies to include on the Priced Orders Report. If the field is left blank, Company will not be used for record selection.
14. Enter a **Pricing Plant Code** or range of pricing plants to include on the Priced Orders Report. If the field is left blank, Pricing Plant will not be used for record selection.
15. Enter a **Suspend Reason** code or range of reason codes to include in the Priced Orders Report. If the field is left blank, Suspend Reason will not be used for record selection.
16. Enter a **Salesman** employee code or range of codes. If the field is left blank, Salesman will not be used for record selection.
17. Select **Exception Items Only** to print an Exception Items Only Report. Do not select this checkbox when printing a Priced Orders Report.
18. Select **Release Suspended Order/Tickets** to release all suspended orders and tickets that are included in the report range. Some people use this option when closing a month to make sure that no suspended orders or tickets have slipped through the cracks.
19. Select **Include Order Specific Prep Customer Notes** to include all notes flagged for invoice prep. This will include all records where the Customer file has a note with the **Invoice Prep** flag checked.
20. Select **Save Settings on Accept** to save the report parameters. All selections for the report are maintained and the report is saved as the Report Name.
21. **Accept** the **Priced Orders Report Selections** screen.
22. Select a print model from the **Possible Print Models** screen.
23. Select a printer using the scrollable list.

If the priced orders report reveals some discrepancies in orders and tickets, correct them at this time using Edit Orders and Tickets.

Summary Pages

The last pages of the register are summary pages; they provide various totals from the report, which are used during balancing. There are four different summaries provided:

- **Sales Totals** - Break down sales totals by Transaction Type and Payment Method.
- **Quantity Totals** - Provide a similar breakdown, in addition to breaking out quantities by measurement system (i.e, US Customary, metric, and total).
- **Sales Tax Totals** - Show taxable sales, non-taxable sales, and tax amounts for all Tax Authority/Locations.
- **Suspended Orders/Tickets** - Lists all suspended orders/tickets that fall in the specified report range.

The Suspended Order/Tickets totals page only prints on the Preliminary Invoice Register.

Printing an Exceptions Report

The Priced Orders Report with Exceptions is a variant of the Priced Orders Report that allows you to combine two editing reports into one. By running an Exceptions Report, you can show all orders as well as create flags to identify the options (shown below) that may require special attention during the editing process. The **symbol** is a user-entered symbol such as **#**, *****, or **X** that will print in the last column on the report, indicating a line item that matches the exception indicated.

In addition to the ability to affect order suspension at the time of order entry, a second means of automatic order suspension lets you run the Priced Orders Report with Exceptions and automatically suspend orders which meet the exception criteria.

To print a Priced Orders report with exceptions:

1. Go to the **Preliminary Invoice Register Selections** screen {Invoicing > Preliminary Invoice Register}.
2. Enter a **Report Name** to save a new report configuration, or select an existing Report Name from the drop-down list. This field can be left blank if you want to run the report with your own settings, but do not wish the save those settings.
3. From the **Report Type** field, select **Priced Orders**.
4. When Priced Orders is selected, the **Exceptions** button will display. Select this button to display the screen on which exceptions are specified.

5. Check the exceptions to be shown on the report. Enter a corresponding symbol for each exception for identification purposes on the report.

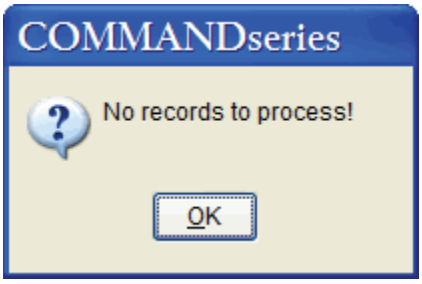
   There are no restrictions on what character can be entered in the **Symbol** field. However, it is best to use a symbol instead of a letter or number to make the exception easier to see.
6. If you enter a valid **Suspend Reason Code for Exception Orders**, all orders that meet any of the selected exception criteria will be automatically suspended, using the entered reason code.
7. Fill out the rest of the selection screen as needed.
8. **Accept** the exceptions screen to return to the main selections screen.
9. **Accept** the **Priced Orders Report Selections** screen.
10. Select a print model from the **Possible Print Models** screen.
11. Select a printer using the scrollable list.

Exception Items Only Option

The Exception Items report can be run in an exclusive fashion. That is, the report can be configured to display only those orders that meet at least one of the specified exception criteria. This report is especially useful in the latter stages of order & ticket prep to verify that there are no zero priced primary or secondary products immediately prior to printing invoices.

To enable the Exception Items Only option, simply select the **Exception Items Only** checkbox on the main **Preliminary Invoice Register Selection** screen. If exception

items are found, they will be displayed in the report as usual. If there are no expectation items, the system will return a “No records to process” message.



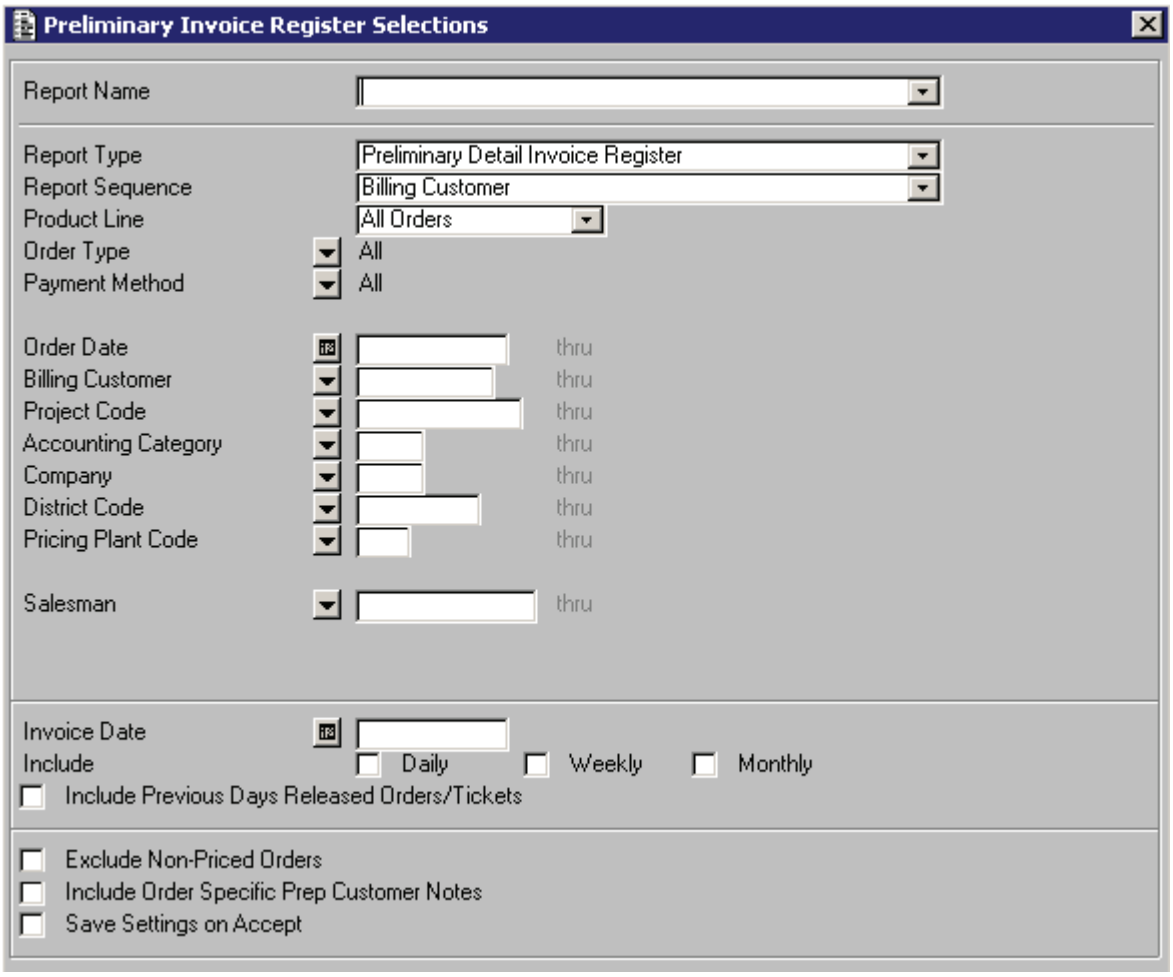
Printing a Preliminary Detail Invoice Register

There are only a few differences between the Priced Orders Report and the Preliminary Invoice Register, but the differences are important to understand.

The Priced Orders report presents the information by order. The Preliminary Invoice Register, on the other hand, simulates an invoice run. That means that customer or project invoice configurations are taken into account. For example, a project can be configured to print one invoice per order, order/PO, project, etc. In addition, the prelim register calculates the due date and available discount for any terms discounts assigned to the included orders.

When Preliminary Detail Invoice Register is selected as the Report Type, you will see the form change in the following ways:

Preliminary Invoice Register Selections Screen



- The **Invoicing Status** field disappears. The Preliminary Invoice Register only returns orders that have not been invoiced. Consequently, this report is used at the end of the month to ensure that all month's orders have been invoiced.
- The **Suspend Reason** field disappears, as does the Release Suspended Orders/Tickets field. Orders cannot be suspended or released from the preliminary register.
- The **Exception Items Only** field disappears. Exceptions can only be run in the Priced Orders Report.
- The **Invoice Date** field appears, along with fields to allow selection of customers by invoice frequency. Choose from the following options:

  Daily

  Weekly

  Monthly
- The option to **Include Previous Days Released Orders/Tickets** becomes available.
- Select **Exclude Non-Priced Orders** to exclude those orders from the Preliminary Invoice Register. Non-Priced orders are defined as those orders in which no pricing is found for the items based on the pricing plant and price set ups for the item.

This field displays only if the **Report Type** is **`Preliminary Detail Invoice Register`** or **`Preliminary Summary Invoice`**. The same flag has been added to the Print Invoice Selections screen for all **Report Type** selections.

The layout of the preliminary invoice register is identical to that of the final invoice register, making balancing easier. The only difference in the preliminary layout is that the Invoice Code field is blank, since that number is not generated until invoices are actually run.

The end of a Preliminary Detail Invoice Register has the same totals pages as a Priced Orders Report. In addition, the very last section of the report is a list of all suspended orders/tickets that fell within the specified report range. These are orders and tickets that would not have been invoiced in an actual invoice run.

If all orders in the specified range are suspended, the system will return a "No records to process" message. To run a report specifically for suspended orders or tickets, use the Priced Orders Report.

Preliminary Summary Invoice Register

The Preliminary Summary Invoice Register is primarily used as a balancing tool. Instead of providing detailed information on individual orders, the summary report only provides a single line of information for each order, showing pre-tax amount, tax amount, invoice total, extended cost, and gross margin.

Two totals pages are provided at the end of the report: Sales Tax and Suspended Orders/ Tickets.

To run the Preliminary Summary Invoice Register follow the steps outlined for "Printing a Preliminary Detail Invoice Register" on page 193, but select **Preliminary Summary Invoice Register** as the **Report Type**.

The summary register takes about as long to generate as the detail register. All of the individual orders must still be processed.

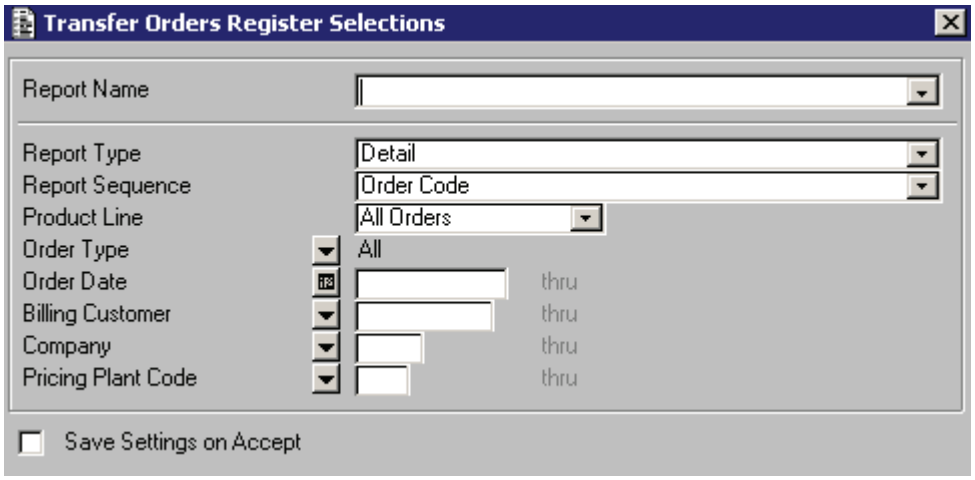
Transfer Orders Register

Transfer orders are not invoiced and therefore do not show up on the Preliminary Invoice Register. Nevertheless, you will need a report that provides detailed information on transfer orders to ensure that your records are accurate.

To print a Transfer Orders Register report:

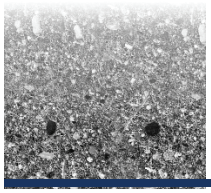
1. Go to the Transfer Orders Register Selections screen {Invoicing > Transfer Orders Register}.

Transfer Orders Register Selections (SELTROR)



2. If you want to create a custom report configuration to be used on a regular basis, enter a **Report Name**, and mark the **Save Settings on Accept** checkbox at the bottom of the screen. Once the report has been configured and accepted, it will be saved under the Report Name you gave it and will be available from the drop down list.
3. Select a **Report Type** from the list to determine the format to use when printing the Transfer Orders Register Report. Select from the following options:
   - **`Detail`**
   - **`Summary`**
4. Select the **Report Sequence** option to determine the method of sorting to use when printing the G/L Distribution Report. Select from the following options:
   - **`Order Code`**
   - **`Order Type`**
5. From the **Product Line** field's list, select one of the following options:
   - **`All Orders`**
   - **`Concrete`**
   - **`Aggregate`**
6. From the **Order Type** field, select the type of orders to include on the Transfer Orders Register Report. The options are:
   - **`Job Transfer`** - Accommodates the shipment of inventoried materials to job sites for inter-company, construction related activity. A Job Cost Phase code will be associated with the order to accommodate the needs of the construction job cost environment. No invoicing will be associated with this order type.
   - **`Material Transfer`** - Used for shipping inventoried materials to an inter-company plant or business. No invoicing will be associated with this order type.
   - **`All`** - To select both Job and Material Transfers.
7. Enter the **Order Date** to specify a date or range of order dates to include on the Transfer Orders Register Report.
8. Enter the **Billing Code** to specify a customer or range of customers to include on the Transfer Orders Register Report.

9. Enter the **Company** to specify a company or range of companies to include on the Transfer Orders Register Report.
10. Enter the **Pricing Plant Code** to specify a pricing plant or range of pricing plants to include on the Transfer Orders Register Report.
11. Mark the **Save Settings on Accept** checkbox to save the report parameters. All selections for the report are maintained and the report is saved as the Report Name.
12. **Accept** the Transfer Orders Register Selections screen.



Suspending Orders and Tickets

Ideally, when a question concerning the pricing of an order is discovered, it can be resolved quickly. Sometimes a problem cannot be solved quickly; if the salesman is out of town, for example, it may not be possible to determine the correct price for an order. This type of problem presents a serious problem: Do you go ahead and print an invoice for a customer, knowing that the invoice is incorrect? Or do you place everything on hold until the issues can be solved?

Some companies choose to go ahead and invoice the order, knowing full well that corrections may have to be made via a credit/debit memo. Other companies choose to **suspend** the disputed order, ticket, or product.

A suspended order/ticket is not the same as a canceled order. When an order/ticket is canceled, as far as the system is concerned, no material was delivered. When an order/ticket is suspended, however, the delivery still took place, materials left inventory, and these events will be reported as such on all dispatching reports. The order/ticket is merely withheld from invoicing until the dispute can be resolved.

Suspending individual products is slightly more complicated. When a product is suspended, the system creates a new, suspended order and moves the specified products to the new order. The suspended products still appear on the original order but the delivered and price quantities fields are zeroed out and inactive. At that point, the suspension is managed at the order level.

Once the price has been verified, the suspended order/ticket/product can be **released**. At that point, it can be invoiced normally.

COMMANDseries provides manual order suspension of orders, tickets, and products from the options menu and automatic order suspension for specific customers, projects, or exception items. The decision on how (or, indeed, if) to use suspension should be made at the company level.

Topics in this section:

Manual Suspension of Orders, Tickets, or Products

Automatic Customer Suspension of Orders

Exception Suspension

Suspended Orders & Tickets Report

Releasing Suspended Orders & Tickets

Editing Suspended Tickets on Invoiced Orders

Manual Suspension of Orders, Tickets, or Products

Orders and products are suspended from the main **Edit Orders and Tickets** screen. Tickets are suspended from the Ticket Information screen.

To suspend an order:

1. Retrieve the order in the **Edit Orders and Tickets** screen {Invoicing > Edit Orders and Tickets}.
2. Select the **Options** menu from the toolbar.
3. Select **Suspend Order** from the **Options** menu.
4. The system will display a confirmation box. Click **Yes** to suspend the order, or **No** to return to the **Edit Orders and Tickets** screen.
5. Select a **Suspend Reason** code on the Reason Code screen.
6. **Accept** the **Reason Code** screen.

To suspend a ticket:

1. Retrieve the order in **Edit Orders and Tickets**. Select the **Tickets** button to display the order's tickets.
2. Locate the ticket you wish to suspend. Click the **Status** button. The **Ticket Status** screen appears.
3. Click the **Suspend** button to place the ticket into a suspended status.

4. Select a **Suspend Reason** code on the Reason Code screen. When you accept the screen, you will be returned to the **Edit Ticket Information** screen. The **Status** button will now be highlighted to indicate that the ticket has been either suspended or canceled.

To suspend a product:

1. Retrieve the order in question in **Edit Orders and Tickets**.
2. Select **Suspend Product** from the **Options** menu. If you select Suspend Product for an order with only one product, a dialog box will instruct you to suspend the entire order.
3. Enter a **Suspend Reason** code on the Suspend Products Selections screen. Click on the detail button for a list of codes.
4. Enter a **Next Order Sequence Code** on the Suspend Products Selections screen. Click on the detail button for a list of codes.
5. Click the checkbox of the product(s) to suspend.
6. **Accept** the **Suspend Products** Selections screen.

7. The system will create a new order for the same order date, move the selected product(s) to the new order, and suspend the new order. A prompt will display the new order and the product(s) suspended. Click **Ok** to accept the suspended product.

Automatic Customer Suspension of Orders

Automatic suspension can be useful for customers with particularly convoluted pricing structures. It helps ensure that you will be able to review the order thoroughly prior to invoicing.

Automatic order suspension is initiated through the entry of a code in the **Suspend Order Reason Code** field on the **Customer Accounting Information** { Files > Customer & Project Information > Customers } and the **Project Accounting Information** {Files > Customer & Project Information > Projects} screens.

When this field contains a valid suspend order reason code, all new non-project orders for that customer should default to a suspended state. When the same field has a valid reason code in the project file, all new project-based orders for that customer will default to a suspended state. **Suspend Order Reason Code** is the label for the field in both cases.

Exception Suspension

Orders can also be suspended through a **Priced Orders Exceptions Report**.

If a valid reasons code is entered in the **Suspend Reason Code for Exception Orders** field, then any order that meets **any** of the specified selections will be suspended.

Suspended Orders & Tickets Report

If a company is to use suspension effectively, a procedure to manage such tickets must be in place. Without such a plan, there is a risk that an order or ticket might get left in suspension limbo, and thus never invoiced.

The Suspended Orders and Tickets Report lists any orders, products, or tickets that have been suspended from the system. This information also automatically prints at the end of the Preliminary Invoice Register.

To print a suspended orders/tickets report:

1. Go to the **Preliminary Invoice Register Selections** screen {Invoicing > Preliminary Invoice Register}.
2. Enter the **Report Name**. This lets you create a report, give it a unique name, and save the parameters by marking the **Save Settings on Accept** checkbox at the bottom of the screen.
3. From the **Report Type** field, select **Priced Orders**.
4. Select an option from the **Report Sequence** list to indicate the sequence in which invoice information will appear.

5. From the **Order Type** field's list, select the type of orders the report will include. The options are: Regular Sale, Incoming Material Dumped, Credit/Debit Memos.
6. Select the **Payment Method**. The options are: Charge, Cash, Check, Credit Card.
7. Select **Suspended Orders/Tickets** for the **Invoicing Status** on the report.
8. Enter the **Order Date** to specify the order date, or range of order dates, to include on the Priced Orders Report.
9. Enter the to specify the customer, or range of customers, to include on the Priced Orders Report.
10. Enter the **Project Code** to specify the project, or range of projects, to include on the Priced Orders Report.
11. Enter the **Accounting Category** to specify the accounting category, or range of accounting categories, to include on the Priced Orders Report.
12. Enter the **Company** to specify the company, or range of companies, to include on the Priced Orders Report.
13. Enter the **Pricing Plant Code** to specify the pricing plant, or range of pricing plants, to include on the Priced Orders Report.
14. Select a **Salesman** or range of salesmen to include on the Priced Orders Report.
15. Mark the **Exception Items Only** checkbox to include only exception items on the report.
16. Mark the **Release Suspended Orders/Tickets** checkbox to release any suspended order and tickets upon running the report. See "Releasing Suspended Orders & Tickets" on page 202. for more information.
17. Mark the **Include Order Specific Prep Customer Notes** checkbox to include all order specific notes to be applied.
18. Mark the **Save Settings on Accept** checkbox to save the report parameters. All selections for the report are maintained and the report is saved as the Report Name.
19. **Accept** the screen.
20. Select a print model from the **Possible Print Models** screen.
21. Select a printer using the scrollable list.

Releasing Suspended Orders & Tickets

A method of automatically releasing orders is available on the **Preliminary Invoice Register Priced Orders** report. A **Release Suspended Orders/Tickets** checkbox lets you invoice immediately after the receipt has run. This functionality also lets you enter a limited range of suspended order reason codes. This constraint will be relevant for both reporting and releasing orders.

To release a group of suspended orders/tickets:

1. Go to the **Preliminary Invoice Register Selections** screen {Invoicing > Preliminary Invoice Register}.
2. Set the **Report Type** to **Priced Orders**.
3. Fill out the form to define a range of orders.

4. If desired, enter a **Suspend Reason Code** or range of reason codes to further restrict the suspended orders affected.
5. Select the **Release Suspended Orders/Tickets** checkbox (This field only displays when running the Priced Orders Report).
6. **Accept** the screen.
7. Select a print model from the **Possible Print Models** screen.
8. Select a printer using the scrollable list.
9. Once the printing of the report is complete, the **Release Suspended Orders/Tickets** screen appears. Mark the appropriate orders for release or click the **All** button to release all orders.
10. **Accept** the screen.

The report will process all uninvoiced reports the meet the selection criteria. In addition, any suspended orders or tickets within the selection criteria will be released.

Editing Suspended Tickets on Invoiced Orders

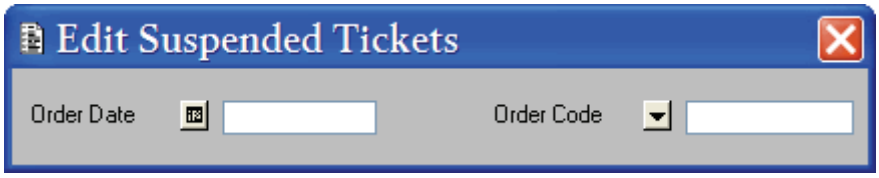
COMMANDinvoicing provides an option in the **Edit Orders and Tickets** function that allows the user to access suspended tickets once the order has been partially invoiced. These tickets can be released and edited without modifying the order.

You can only edit the suspended tickets of a partially invoiced order. You cannot edit any invoiced tickets or the order itself.

To edit suspended tickets on invoiced orders:

1. Select **Edit Suspended Tickets** from the **Option** menu on the **Edit Orders and Tickets** screen. The **Edit Suspended Ticket** screen appears.
2. Enter the **Order Date** and **Order Code** of the order with suspended tickets.

   The **Order Date** and **Order Code** information automatically default to the **Edit**



   Suspended Tickets screen. However, the **Edit Orders and Tickets** screen prompts you that the order has been invoiced and no changes may be made to the order or the invoiced tickets. Only the suspended tickets remaining on the partially invoiced order may be changed.
3. The **Edit Ticket Information** screen appears and displays all suspended tickets for the partially invoiced order.

   Both the shading of the **Status** button and the asterisk indicate that the ticket is either suspended or canceled.
4. Edit the ticket, if necessary, or leave the information as it is.
5. Once you have edited the suspended ticket, and are ready to release the suspended ticket for invoicing, click the **Status** button.

6. The **Ticket Status** screen appears. Click **Release** to release the ticket.
7. The asterisk (*), which distinguishes a suspended ticket, is removed from the **Edit Ticket Information** screen, and the **Status** button returns to normal. The ticket is now released. **Accept** the **Edit Ticket Information** screen. You can invoice the previously suspended ticket on the order now.

Edit Orders and Tickets

The **Edit Orders and Tickets** function lets you correct discrepancies identified from preliminary invoice reports or to add to incomplete order and ticket information.

The primary functions of **Edit Orders and Tickets** include:

- General order and ticket preparation
- Suspending orders and tickets
- Issuing Credit/Debit memos

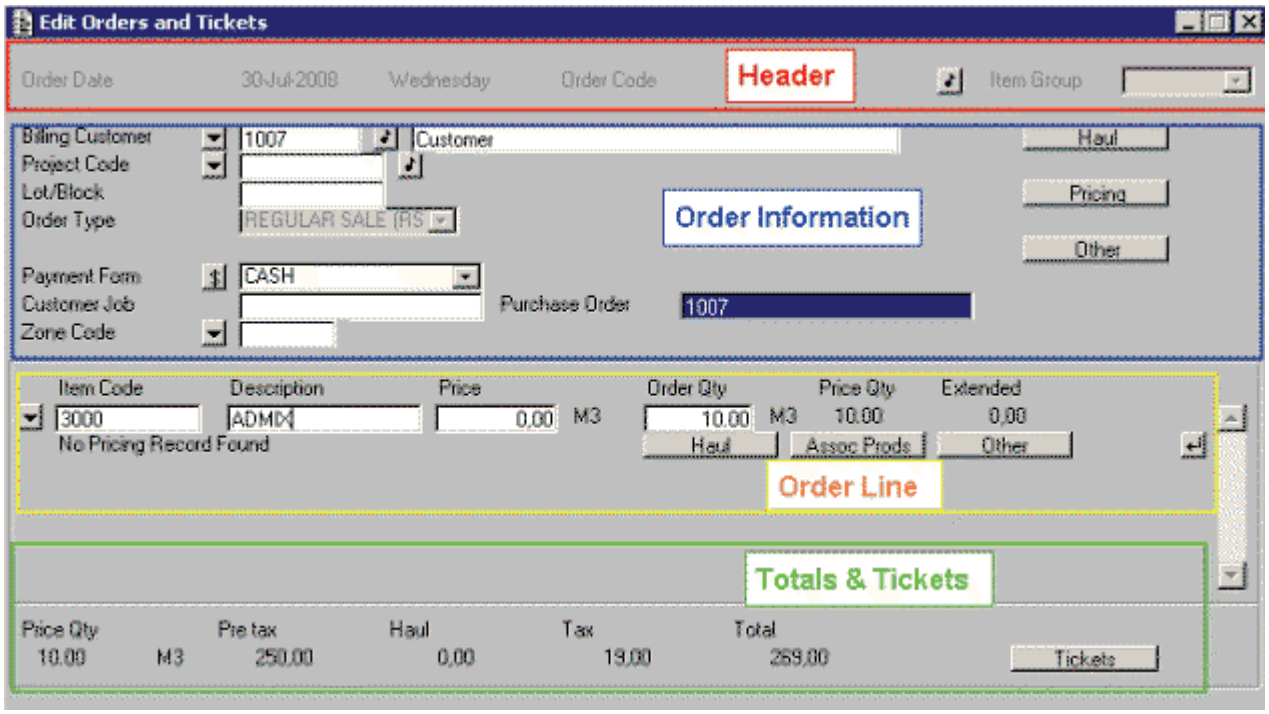
Topics in this section:

Edit Orders and Tickets Screen
General Order & Ticket Prep
Editing Tickets
Credit & Debit Memos
Options Menu

Edit Orders and Tickets Screen

The basic layout of the main **Edit Orders and Tickets** screen (EDTPREP) is similar to that of the standard Order Entry screen:

Edit Order and Tickets (EDTPREP)



The **Header** contains the primary database keys – the fields that define a unique database record. In the case of orders, the primary keys are the **Order Date** and the **Order Code**. This section also indicates the **Item Group** of the order currently being displayed.

The **Order Information** section contains information relating to the order as a whole. In addition to customer and project information, pricing (including charges), haul and other information related to the order as a while are accessible under the appropriate buttons. The layout is virtually identical to the same section in the standard Order Entry screen, with one notable exception – on this screen, the delivery address is accessed through the **Other** button. This is because although the material has already been delivered, the delivery address isn't as critical a piece of information as it was before.

The **Order Line** contains the items/products on the order. Primary and extra products are on individual order lines, while admixes are under the **Assoc Prods** button for the relevant mix. Cartage charges associated with particular order lines can be viewed and edited by pressing the **Haul** button in this section of the screen . The **Other** button lets you add other information related to a particular order line. The **Calculations** button displays on order line items that are project products, and when pressed displays the amount of that item that has been ordered and delivered so far in the project. See "Forecasted Shipped Quantity" on page 52. for more information.

The **Totals and Tickets** section provides totals so that you can confirm your price corrections. The **Tickets** button opens the **Edit Ticket Information** screen, along with all tickets attached to the current order.

General Order & Ticket Prep

Once pricing reports have been reviewed and edited, the corrected information has to be entered into the system. Corrections to orders and tickets are made in the **Edit Orders and Tickets** screen.

When errors are discovered, be sure to determine how the error came about. If an order is priced incorrectly because an item is priced incorrectly in a master file, you will need to correct the error in the master file as well, or else you will be making the same correction over and over again.

There are multiple screens in the **Edit Orders and Tickets** system, but all of them fall into two distinct functions: editing orders and editing tickets. Before editing records, you should understand how COMMANDseries uses information from the order and ticket record to generate the **Extended Price**, which is the amount the customer is charged for any given item.

Below is a screen shot of a line-item entry on the main **Edit Orders and Tickets** screen. This information comes from the Order Line record (ORDL).

- The **Price Source Information**, displayed below the **Description** of each product, indicates where the price originated. It can be used to identify correct pricing or pricing problems.
- The **Price** field indicates the unit price. If all you need to do is change a primary product's price, you can do it from this screen. Press the **D** button to display the entire

price source code description (taken from the **PRICE_DERIVED_FROM_CODE** field in the ORLD table), which describes how the price was entered.

- The **Order Qty** field indicates how much material was initially ordered. It is included on this screen as a reference; the order quantity is not used in any invoicing calculations. It is provided primarily as reference.
- The **Price Qty** field shows the sum of the item's Price Quantity values from all tickets on the order. The field is inactive on the main **Edit Orders and Tickets** screen. To change a price quantity, you must edit the individual ticket(s).
- The **Extended** price is the Price times the Price Quantity. It is the total price for the item on this order.

The important thing to remember is that if you want to change the price of an item, you can do it from the main Edit Orders and Tickets screen, without editing the tickets. If all you need to do is adjust the quantities involved, all you have to do is edit the ticket.

Above all, if you are adding an item to the order, you must add it to both the order and ticket, **or the customer will not be charged.**

The Edit Orders and Tickets screen is not intended as a Dispatch or Order Entry tool. Orders for the current date can be edited and created; however, any order information entered in Edit Orders and Tickets will not be updated on the Tracking & Scheduling screen. If the current date is entered, warn the user that the tracking system will not be updated.

To edit orders:

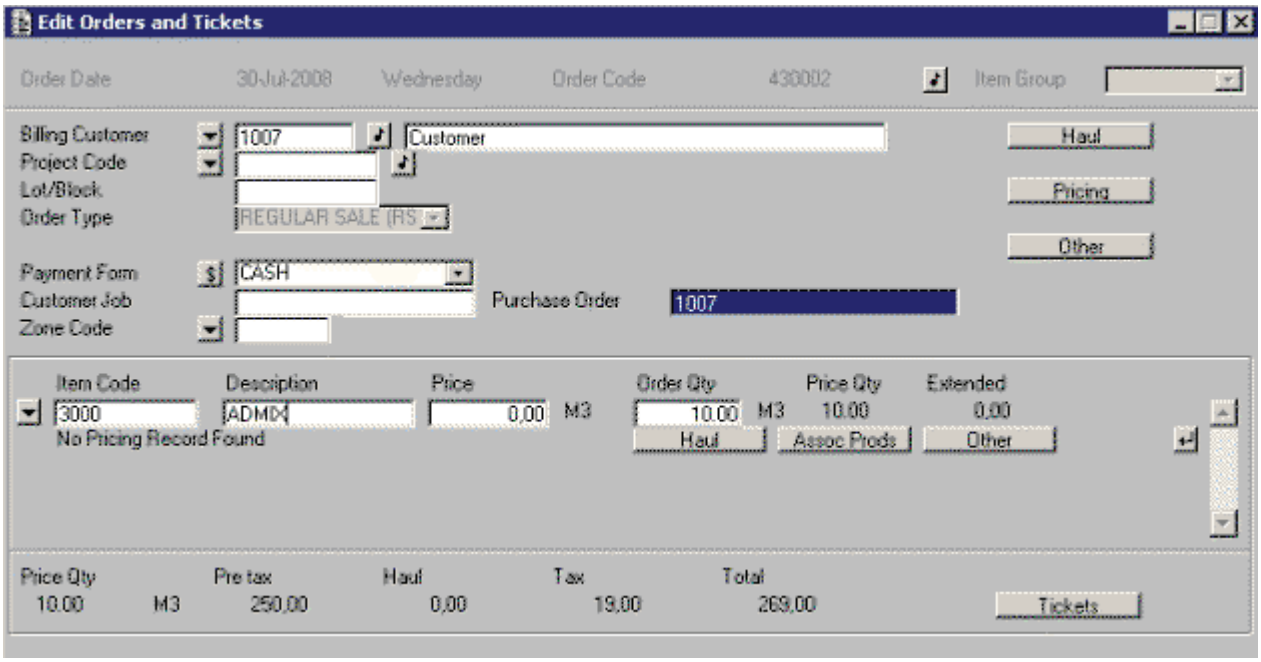
1. Open the Edit Orders and Tickets screen {Invoicing > Edit Orders & Tickets}.
2. In the **Order Date** field, enter the date on which the order was shipped. This can be the current date or any previous date. The default value is one day prior to the current day.
3. Enter the **Order Code** of the order to edit. If the order code already exists, current order information is retrieved and displayed.

   You may also detail on the field to display a list of orders for the specified date.

   If you are creating a new order using this screen, tab through the **Order Code** field to generate a code based on Next Numbers, or enter an appropriate order code (the code will not be generated until the order is saved). An order code can be entered manually, but it is not recommended; the manually-entered code might conflict with an existing order code.

   When you tab out of the **Order Code** field, the header will turn gray, indicating that it is no longer available. The rest of the form will activate.

   Steps 4-11 refer to creating a new order, rather than editing an existing one.



4. Enter a , or detail on the field to access the lookup screen.

   Once a is selected, the code and the corresponding **Customer Name** are populated on the form. The Customer Name can be only be edited for COD orders.

5. After the customer is selected, the system checks for the existence of projects for that customer. If any are found, the cursor moves to the **Project Code** field. Enter a valid project code or detail on the field to select from a list of projects for that customer.

   When the cursor leaves the **Project Code** field, the system begins a basic credit check.

   - If a project is present, the system checks the credit code of the project.
   - If no project is present, the system checks the credit code of the customer.
   - If the credit code is invalid, the system notifies you and returns the cursor to the field so you can enter a valid customer and/or project.

6. Enter the **Lot/Block**. This field identifies lot/block information for a project order. This feature is a key component of COMMANDlien, and is required if COMMANDlien is licensed. See the **COMMANDlien User Guide** for more information. The **Order Type** can default from the project file; **Regular Sale** will be the most frequently used option. Use the drop-down button to select. (See “Order Types” on page 75. for additional information regarding order types.)

7. The **Order Type** field determines how this record will be processed by the AR system.

8. The **Payment Form** specifies how the customer will be paying. Available payment options for a customer are determined by the customer’s assigned credit code.

   - If the customer has been cleared for charge orders only, the **Payment Method** field will display **`Charge`**. The field will be grayed out; you cannot change it.
   - If the customer credit code allows for multiple payment forms, a dialog box will display asking you to select a **Payment Form**; Payment Forms are user defined.

Select a radio button and accept the dialog box. The selected option will display in the **Payment Form** field. The field will be active—you can press the drop-down button to change the payment option.

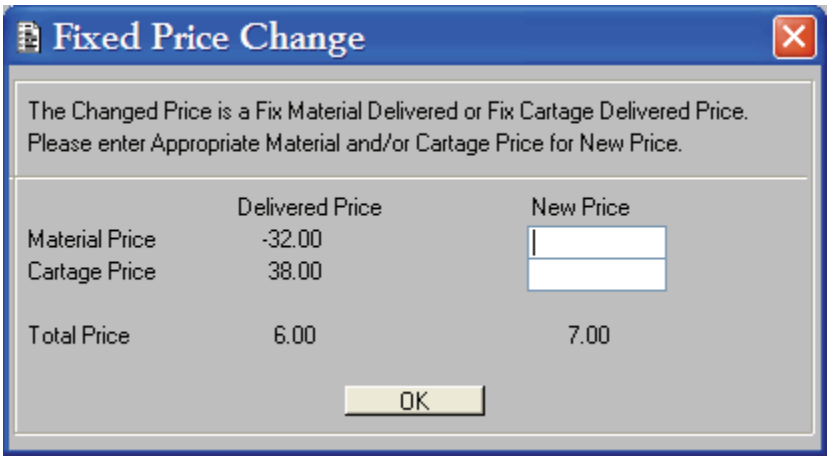
- There is a button to the left of the **Payment Form** field, labeled with a dollar sign (**$**). This button brings up a screen for additional information about the customer's payment.

For checks, enter bank and check information; for credit cards, enter account numbers expiration dates, authorization codes, etc.

9. Edit any further information on the Edit Orders and Tickets screen or fill in fields that had been left blank.
   The **Pricing**, **Other**, **Haul** (for aggregate orders), and **Tickets** buttons enable you to go to those screens and edit the information contained therein.
10. When you've finished editing an order, **accept** the screen.

    If you change a **Fixed Material Delivered** or **Fixed Cartage Delivered** price, you will have to change the price breakdown. The Fixed Price Change screen will display automatically.

Fixed Price Change (EDTPREP9)



Update the **Material Price** and **Cartage Price**, and accept the screen to continue.

When editing an existing ticket, if a change will alter its value, the system checks for any receipts against that order. If the order has a receipt that is not fully allocated, the allocated amount is updated appropriately.

Order Pricing Information

The Order Pricing Information screen {Invoicing > Edit Orders & Tickets > Pricing} lets you set various pricing and taxing related information. This information defaults from either the customer or project Pricing Information screen.

Changes made to an order's pricing structure from this screen override customer and project pricing information, but do not change the customer and/or project files. This editor will only change the current order!

To enter order pricing information:

1. Go to the Order Pricing Information screen {Invoicing > Edit Orders & Tickets > Pricing button}.
2. Change the **Pricing Plant Code** if necessary. This field identifies which plant these products are priced from for this specific order. This code is found in the **Plant Code** field in the Plants editor {Files > Plant & Delivery Information > Plants}.

   The pricing plant can default from the scheduled delivery plant by selecting Default Pricing Plant from Scheduled Plant in the configuration of COMMANDseries {File > General Information > Configuration > Dispatch}.
3. The discount **Terms Code** for the current customer/project is displayed for reference. It cannot be edited.
4. Select **Apply Zone Charges** if necessary. The zone charges are calculated based on the **Zone Code** field. In addition, zone charges are also used in conjunction with zone-based destination taxing.

   This option is rarely used in the aggregate industry. Check with your CA customer service representative for further information.
5. To **Apply Minimum Load/Haul Charges**, select that checkbox. The minimum haul charges are calculated based on information in the charge/cartage table selected.
6. To **Apply Seasonal Charges**, select that checkbox. The seasonal charges are calculated based on the **Seasonal Charge Table** field. Select the seasonal charge table using the detail button.
7. To **Apply Unloading Charges**, select that checkbox. Unloading charges will be calculated based on the **Unloading Charge Table** field. Select the unloading charge table using the detail button.

   Unloading charges do not appear in the COD Calculator for a COD order. These charges are determined once ticket times are completed.
8. To **Apply Sundry Charges** to an order, select that checkbox. Sundry Charges are extra charges added to an order, such as after-hours delivery, a weekend delivery, environmental charges or a minimum ticket charge. Sundry Charges provides you with a way to charge customers for purchases that exceed normal circumstances.
9. To create a separate invoice for any of the above charges, check the **Create Separate Invoice** check box on the appropriate line.
10. Enter the **Tax Code** for the plant/order. These fields identify the tax code representing the location where the load ownership changes. This code will be the taxation point for the order and all of its tickets. Origination-based taxation, destination-based taxation, all taxable and non-taxable sales, and the tax amount itself, are related to the tax authority/locations assigned to this tax code. The Order Tax Code can default from several different locations: Customer, Project, or Zone.

    The **Tax Code** field supports **Smart Lookup:** if you type in the first few letters of a tax code description (often a city or municipality name) and detail on the field, the system retrieves a list of tax codes that match the entered search string. If only one tax code matches the string, the system automatically retrieved that code into the form.

    Because some orders have more than a single taxation point, you can adjust both the **Plant Tax Code** and the **Order Tax Code** separately, if necessary. Once the order ships, however, only the Plant Tax Code may be modified.

11. In the **Taxable** field, choose whether the order is **Taxable** or **Non-Taxable**. If Taxable is selected, the Non-Taxable Reason is unavailable. If the order is non-taxable, enter a **Non-Taxable Reason Code**. This field identifies the reason the order is non-taxable. This code is found in the Reason Code field in the Reason Codes editor {Files > General Information > Reason Codes}.

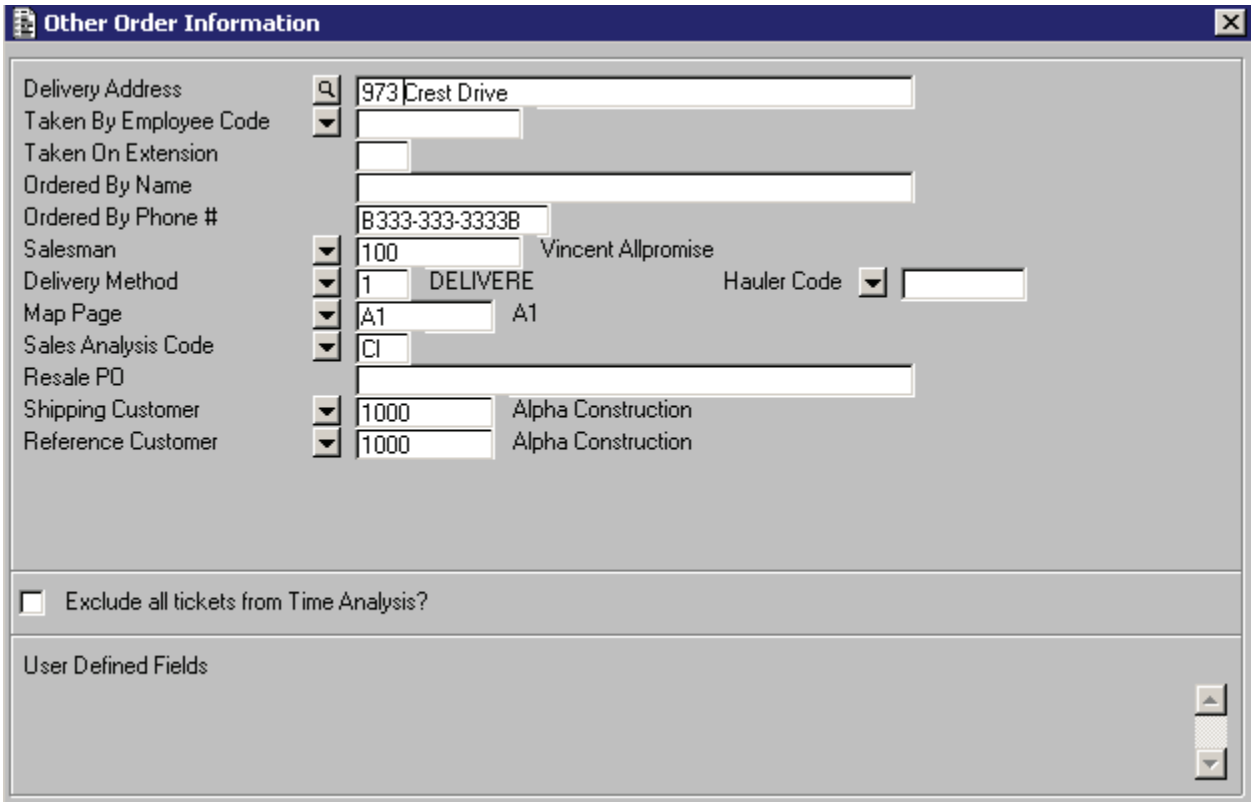
    If an order is set to be non-taxable, each order line on the Order Report shows as non-taxable, regardless of how the item is set up.

12. Some allow sales tax reduction for qualified customers. If you have tax reduction enabled in your system, detail on the **Sales Tax Reduction Profile Code** field to select a valid code.
13. **Accept** the Order Pricing Information screen.

Other Order Information

The Other Order Information screen {Invoicing > Edit Orders & Tickets > Other} contains additional fields related to the order. Any of these fields can be printed on the order and/or ticket by including the fields in the appropriate document format.

Other Order Information (EDTPREP3)



To enter other order information:

1. Enter the **Delivery Address** for the order. In Order Entry, this field is required and is located on the primary order screen. When entering an order in prep, the delivery address is considered secondary information because the material has already been delivered.

2. The **Employee Code** of the person entering the order into the system defaults into the **Taken By Employee Code** field, but only if the COMMANDseries user code is linked to the employee's code.
3. The **Taken On Extension** field lets you record the extension number on which the order was taken. Some phone systems record all calls based on extension. Entering the extension on this screen makes it easier for the user to retrieve the stored call.
4. The **Ordered by Name/Ordered by Phone #**fields are used to store site-specific information relating to the order. These values will default from the Customer Contact and Phone #1 fields, respectively, in the customer/project record.
5. Enter the **Salesman** who generally works with this customer.
6. Enter a **Delivery Method, Hauler Code,** and **Map Page**. As with the delivery address, these fields are considered secondary information because the material has already been delivered.
7. Enter a **Sales Analysis Code**. This field is used by COMMANDexecutive to generate Sales Reports and usually defaults from the Customer or Project file.
8. Enter a **Resale PO** number if necessary.
9. For further reference, enter a **Shipping Customer** and a **Reference Customer** in the associated fields.
10. If circumstances surrounding the order's delivery are such that you need to exclude the tickets from time analysis, select the **Exclude all tickets from Time Analysis** check box. This option is often used when processing debit/credit memos, or order in which delivery was delayed by unusual circumstances.
11. The **User Defined Fields** area allows users to append additional information on orders, payments, customer files, etc. To add a comment, click in the appropriate field and enter the comment. In some cases, comments will already be completed.
12. **Accept** this screen to save your changes, if any.

Order Haul Information

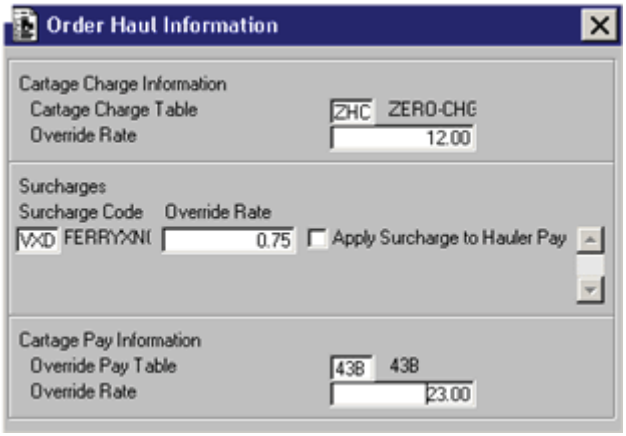
Order haul charges are initially established by the customer and/or project files. Most of the time, you have no need to modify these settings during order entry. In some cases, however, you may want to modify or review the haul charges for an order.

The haul charge settings are accessible through the **Haul** button on the Order Entry or Edit Orders and Tickets screen.

To modify order-level haul charges:

1. On the Edit Orders and Tickets screen, enter a customer code and, if necessary, a project code. The **Haul** button will not display until a valid customer code has been entered.
2. Select the **Haul** button. The Order Haul Information screen displays.

Order Haul Information (EDTORDR1)



The existing information is defaulted from the customer or project files or from manual entries made in Order Entry. Any changes made to this screen will not affect those master files, but will instead affect only this order.

3. Enter a **Cartage Charge Table**, or detail on the field to select from a list.
4. If necessary, enter an **Override Rate** for the cartage charge.
5. Enter a **Surcharge Code**, or detail on the field to select from a list.
6. If necessary, enter an **Override Rate** for the surcharge.
7. If necessary, select **Apply Surcharge to Hauler Pay**.
8. If necessary, select Add Occurrence to add another surcharge.
9. Enter an **Override Pay Table**, or detail on the field to select from a list.
10. If necessary, enter an **Override Rate** for the pay table.

11. **Accept** the screen to save the settings and return to the Order Entry screen.

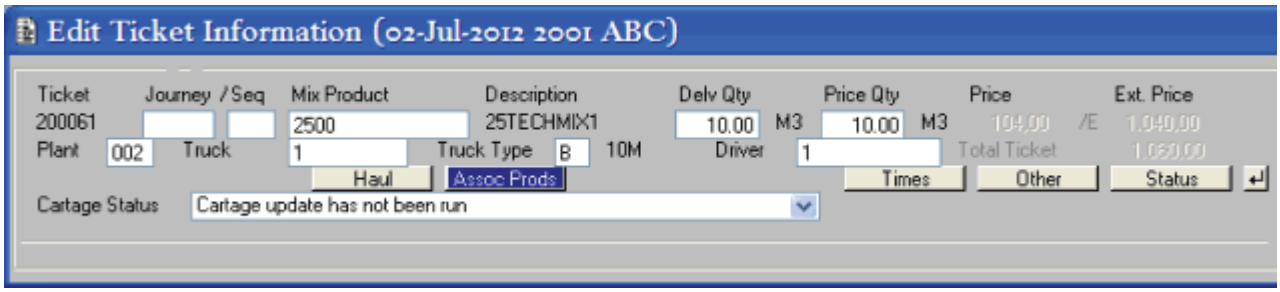
Editing Tickets

Once order-level information has been entered or modified, tickets can be edited. When entering or editing tickets, it is important to remember that an item can only be added to a ticket if it has already been added to the order.

To edit concrete tickets:

1. Open the Edit Orders and Tickets screen {Invoicing > Edit Orders & Tickets}.
2. Open the order containing the tickets to be edited.
3. Edit order information on the main Edit Orders and Tickets screen as needed.
4. Press the **Tickets** button in the lower right of the screen. The Edit Ticket Information screen displays.

Edit Ticket Information (EDTPREP7)



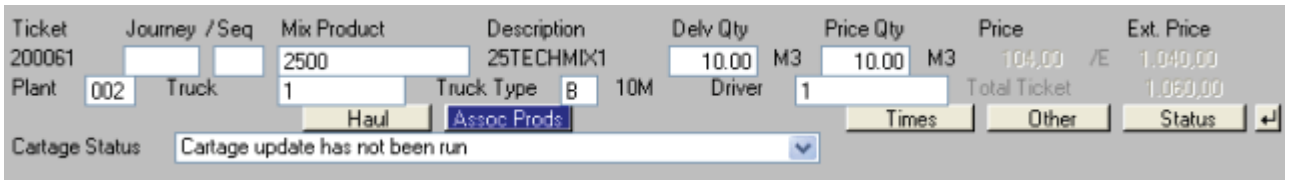
The screen title bar shows the Order Date, Order Code, and Customer Name in parentheses.

The **Associated Products** and **Extra Products** buttons will be displayed on all of an order's tickets if there are associated or extra products on the order. If, for example, an associated product has been delivered on a ticket, the **Associated Product** button for that ticket will be highlighted.

Similarly, the **Charges** and **Haul** buttons will display on all tickets if the order is subject to charges. If a charge has been added to a ticket, the **Charge** and/or **Haul** buttons for that ticket will be highlighted.

The **Times**, **Other**, and **Status** buttons are present for all tickets. The **Times** button will be highlighted if any tickets times are present; however, the times may not be accurate or complete. The **Status** button will be highlighted if the ticket has been canceled or suspended.

Ticket Detail



5. If you are editing an existing ticket, the **Ticket** field is inactive. Existing ticket codes cannot be changed.

   If you are entering a new ticket, enter a Ticket Code. The system will alert you if you enter a ticket code that is already in use on another order, but it will not prevent you from saving the duplicate number. The system will not allow duplicate ticket numbers within a single order.

6. If there is only one mix on the order, that mix will default into the **Mix Product** field. If there are multiple mixes on the order, enter a Mix Product, or detail on the field to select from a list of mixes on the order.

   - You cannot add a product to a ticket unless that product has already been entered at the order level.

7. Enter a **Delivered Quantity**. This value represents the amount of material delivered to the customer, and controls usage reports and inventory. It has no bearing on what the customer is charged.

8. Enter a **Price Quantity**. This value has no impact on usage or inventory; this value is multiplied by the price from the order record to determine the Extended Price for the product.

   In most cases, the **Delivered Quantity** and the **Price Quantity** will be identical. In some cases, the price quantity might be reduced to give the customer a special discount. If, for example, a load was particularly late, or the concrete truck accidentally ran over a mailbox, the customer might be given a free yard of concrete by reducing the price quantity by one. As long as the delivered quantity isn't also reduced, inventory will remain correct.
9. Enter the **Plant** that batched the material.
10. Enter the **Truck** that delivered the material. The truck's assigned **Driver** will default, but can be changed if necessary.
11. The **Total Ticket** field provides a running total of all charges on the ticket.
12. If there are associated products on the order, the **Associated Products** button displays. Press the button to display the Ticket Associated Products screen.

    You may edit information here as necessary. Note that the UOMs for Delivered and Price Quantity for admixtures are often different.

    Accept the screen to save and return to the main prep screen.
13. If there are extra products on the order, the **Extra Products** button displays. Press the button to display the Ticket Products screen.

    You may edit information here as necessary.
14. Press the **Charges** button to edit ticket level charges.
15. Press the **Times** button to review/enter ticket times for the ticket.

    The colon does not have to be included when you enter a time: **`1123`** will be converted to **`11:23`**. The system looks for military time (0-24). To avoid having to continually add twelve to something during entry of afternoon and evening times, add **`P`** to the end of a PM time to have the system convert it. For example, **`245P`** would be converted to **`14:45`**.
16. **Accept** the screen to save changes and return to the Ticket Information screen.
17. Press the **Other** button to display the Other Ticket Information screen.

    This information can be edited as necessary, although it is unlikely that you will need to edit information on this screen on a regular basis.
18. Accept the screen to return to the Edit Ticket Information screen.
19. The **Status** button opens a screen that allows you to set the ticket as **`Active/Removed`** or **`Suspended/Released`**.
20. When the cartage tickets are updated for a dispatch ticket, the Cartage Status field is updated accordingly:
    - Cartage update has not been run (default)
    - Do Not Invoice- Ticket qualifies, but at elast one CTTK was n ot created
    - OK to Invoice- Ticket qualifies and Cartage Ticket(s) created
    - OK to Invoice-Does not Qualify for Cartage
    - Do Not Invoice- User Override
    - OK to Invoice-User Override

The two override options can only be set manually on this screen, or can be set during a ticket import.

21. Proceed to other areas of the prep screen, or **accept** the screen to return to the main Edit Orders and Tickets screen.

To edit aggregate tickets:

1. Open the Edit Orders and Tickets screen {Invoicing > Edit Orders & Tickets}.
2. Open the order containing the tickets to be edited.
3. If necessary, edit order information on the main **Edit Orders and Tickets** screen.
4. Press the **Tickets** button in the lower right of the screen. The Edit Aggregate Ticket Information screen displays.
5. If you are editing an existing ticket, the **Ticket** field is inactive. Existing ticket codes cannot be changed.

   If you are entering a new ticket, enter a Ticket Code. The system will alert you if you enter a ticket code that is already in use, but it will not prevent you from saving the duplicate number.
6. Enter the **Plant** that provided the material.
7. Enter the **Truck** that delivered the material.
8. Enter a **Product**, or detail on the field to select from a list of products on the order.
   - You **cannot** add a product to a ticket unless that product has already been entered in the order.
9. Enter a **Delivered Quantity**. This value represents the amount of material delivered to the customer, and controls usage reports and inventory. Unlike Concrete tickets, which allow for differences between the delivered Quantity and the Price Quantity, the Price Quantity for aggregate tickets is automatically set as the delivered quantity.
10. As soon as a delivered quantity is entered, the system will calculate cartage charges for the ticket. Press the **Haul** button to review haul charges attached to the ticket.

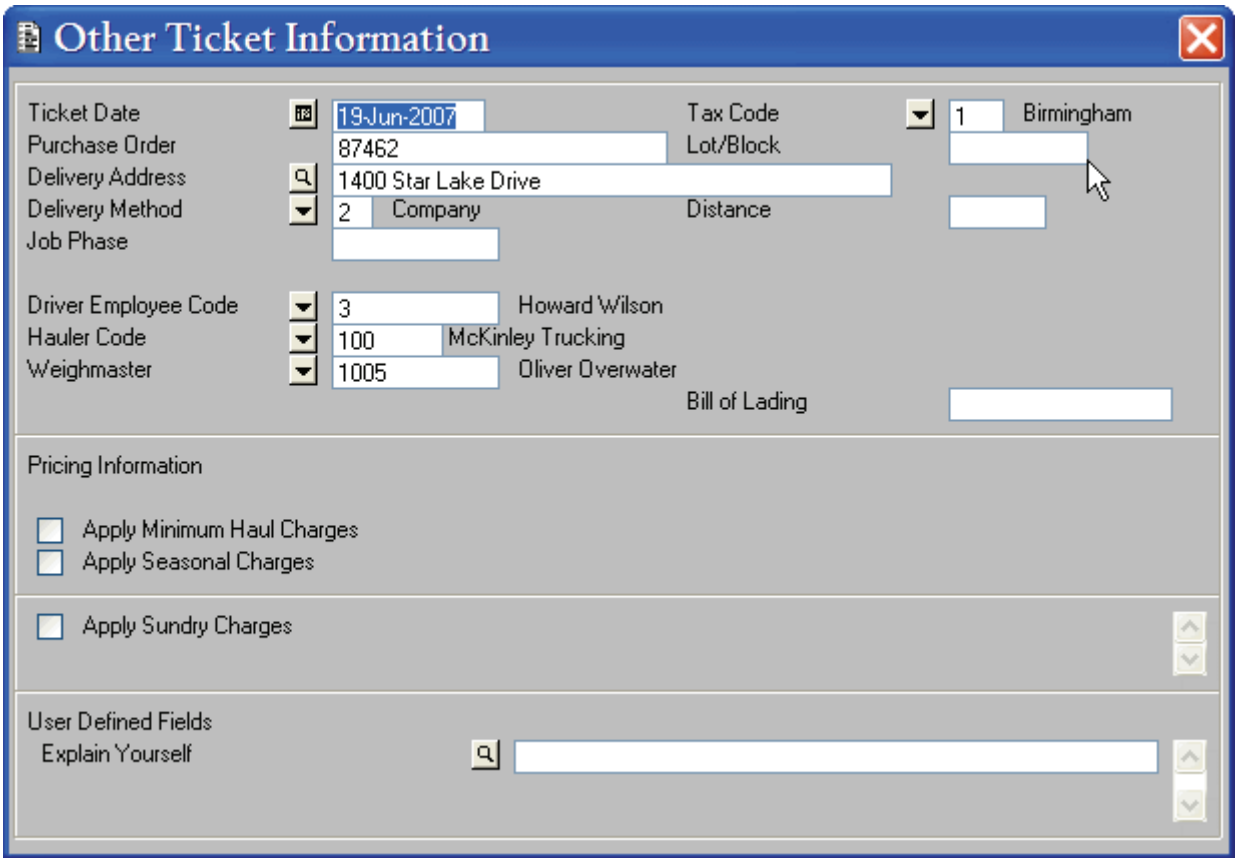
Product Cartage Charges (EDTPREPR)

If the order is configured to combine haul charges with the material charges, text at the bottom will display, reading "These charges are included in the delivered price on the front screen. They will not show separately."

Accept the screen to return to the ticket editor.

11. Press the **Times** button to review/enter ticket times for the ticket.
12. Press the **Other** button to display the Other Ticket Information screen.

)



This information can be edited as necessary, although it is unlikely that you will need to edit information on this screen on a regular basis.

13. The **Status** button opens a screen that lets you set the ticket as **`Active/Removed`** or **`Suspended/Released`**.
14. Proceed to other areas of the prep screen, or **accept** the screen to return to the main Edit Orders and Tickets screen.

Removing Items

Occasionally it is necessary to remove an item from an order or ticket; for example, if a pack of expansion joints gets left accidentally off a delivered load of concrete, but is still included on the ticket.

To remove a delivered product from an order:

1. Retrieve the order in Edit Orders and Tickets. Below is a detail from an order:

   Let's say that the expansion joints were not delivered, so we want to remove them from the order. You cannot simply delete the expansion joints from the order line; if you try, you will get the following error message:

   This restriction is here to protect the integrity of the database.

Clearing the **Order Quantity** field will not accomplish anything, because the customer is charged based on ticketed quantities; the ticket record must be removed.

2. Select the **Tickets** button. The Edit Ticket Information screen displays:

   The illuminated **Extra Products** button indicates tickets that contain extra products. If the product you are trying to delete was delivered on multiple tickets, you must remove the product from all of those tickets before you can remove the product from the order.

3. Select an illuminated **Extra Products** button. The Ticket Extra Products screen displays.
4. Clear the **Delivered Quantity** field (or change the value to zero) and press <Tab>.
5. **Accept** the screen. When you accept the screen, the **Price Quantity** field will automatically be cleared as well.

   The **Price Quantity** field will update automatically only if the **Delivered Quantity** field is cleared or set to zero. If the **Delivered Quantity** is increased or reduced to a value greater than zero, the **Price Quantity** must be manually updated

   If there were no additional extra products on the ticket, when you return to the **Edit Ticket Information** screen, the **Extra Products** button will no longer be illuminated. If there were additional extra products, the button will still be lit.

   A quick way to confirm that change has been made is to check the **Total Ticket** price; when you accept the extra product screen, the total amount should be reduced.

6. **Accept** the Edit Ticket Information screen to store your changes and return to the main Edit Orders and Tickets screen.

   Confirm that both the **Price Quantity** and **Extended Cost** for the product are zero. If they are not zero, return to the Edit Ticket Information screen and verify the **Delivered Quantity** and **Price Quantity** values.

   If they are zero, use the **Remove** command to remove the product from the order.

   - Some companies will leave the zeroed-out product on the order so that if a credit/debit rebill is done, the product will appear on both credit and debit memos.

7. **Accept** the screen to save the order.

Removing/Editing Charges

Users have a number of options when it comes to editing or removing charges from orders. Basic changes, such as removing a charge from the entire order, can be made at the order level, while finer changes, such as or removing a charge from a single ticket, may need to be made at the ticket level.

When a charge is removed, it can be removed completely from the order. When this happens, the charge does not show up on the customer invoice. If the charge is zeroed out, it will still print on the invoice.

To edit/delete a charge at the order level:

1. Open the order in Edit Orders and Tickets.
2. Select the Pricing button. The Order Pricing Information screen opens.
3. From this screen, there are a number of options:

- To add a charge, select the appropriate **Apply** checkbox. For minimum load, seasonal, unloading charges, select a **Charge Table**.
- To remove a charge from an order, deselect the appropriate **Apply** checkbox. When the screen is accepted, the system will display a dialog box stating that charges are being removed or recalculated.
- To change the charge rate on a charge other than a sundry charge, detail on the **Charge Table** field and select a different charge table.
- To change the charge amount of a sundry charge, enter an override in the **Rate** field.

4. **Accept** the screen. The system will display a dialog box stating that charges on tickets are being removed and/or recalculated.

- If an unloading charge was added or modified, Calculate Unloading Charges must be rerun to update the order. The routine will replace existing unloading charges with the updated rates.

To edit/delete charges at the ticket level:

1. Retrieve the order in Edit Orders and Tickets.
2. Select the **Tickets** button to open the Edit Ticket Information screen.

   If a charge has been entered on a ticket, the **Charges** button will be illuminated.
3. Select the **Charges** button on a ticket with active charges. The Ticket Charges screen displays.

   The sundry charge information is grayed out and cannot be edited from this screen. All

Ticket Charges (21238)
Product Charges
Item Code Description Delv Qty Price Qty Price Ext. Price
105 Small Load Chg 1.00 ea 1.00 ea 100.00 100.00
95 Excess Unloading 41.00 ea 41.00 ea 10.00 410.00
Ticket Charges
Item Code Description Delv Qty Price Qty Price Ext. Price
96 Saturday Deliver 1.00 ea 1.00 ea 150.00 150.00

   changes to sundry charges must be made on the Order Pricing Information screen.
4. There are a number of options from this screen:
   - A charge can be removed from the ticket by selecting the line and using the **Remove** command. When the ticket is invoiced, the charge is not printed on the invoice.
   - A charge can be "zeroed out" by changing the **Price** to zero. When the ticket is invoiced, the charge is printed on the invoice, but with an extended price of zero. Some companies will zero out unloading charges so that the excess time will be printed on the invoice, letting the customer know of the delay.

- A charge can be edited in the **Delivered Quantity**, the **Price Quantity**, and/or **Price** fields.

If a charge is edited at the ticket level, and the charge is subsequently removed and restored at the order level, the charge will be restored with the calculated values, not the edited values.

5. **Accept** the Ticket Changes screen, **accept** the Edit Ticket Information screen, and **accept** the Edit Orders and Tickets screen.

Credit & Debit Memos

If an error is discovered before an order is invoiced, it can be corrected at the order level (in Edit Orders and Tickets), but once the order has been invoiced, corrections must be made either in COMMANDinvoicing or COMMANDreceivables.

Relatively small adjustments are usually made on the Receivables side. It's fairly simple, and you can make the adjustment at the same time you process the payment for an invoice. However, one drawback of Receivables adjustments is that you do not get something official looking to send to the customer documenting the correction. The correction will appear on the customer's next statement, but it will not have any explanatory information. Consequently, for larger corrections, most companies rely on credit/debit memos.

There are three basic approaches to performing a correction with Credit/Debit memos:

- Credit/Debit Memo with a per unit adjustment
- Credit/Debit Memo with a single blanket adjustment
- Full Credit and Rebill

You can control whether a Credit Charge (based on Terms Discount) is to be applied to Credit Memo Invoices and/or Debit Memo Invoices at the point in time when the Memo is created.

Credit Charges represent an addition to a Customer's Invoice that can be taken off if the Customer pays the Invoice by the prescribed date. Otherwise, the Customer pays the Invoice amount, including the Credit Charge.

Credit Memos

If a customer has been billed incorrectly, you can use a credit or debit memo to correct the charge and provide the customer with a record of the correction. Once invoiced, an order can no longer be edited; however, it can be used as a template for the credit/debit memo, streamlining the entry process.

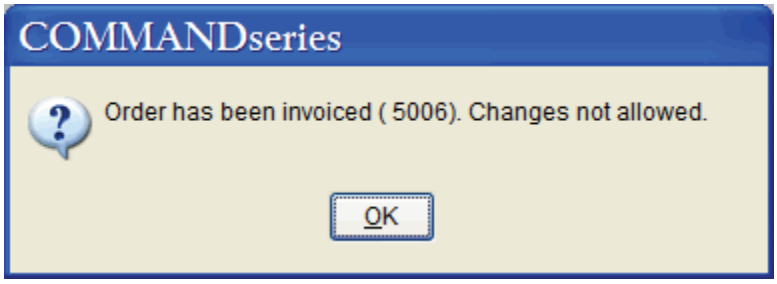
Credit memos can be used to make small adjustments, or they can be used to credit the entire order back to the invoice.

To create a credit memo:

1. On the Edit Orders and Tickets screen, enter the **Order Date** and **Order Code** of the order you wish to correct. The rest of the fields automatically fill with previously entered details of the order.

   If the order has already been invoiced, a dialog box will appear:

Invoiced order

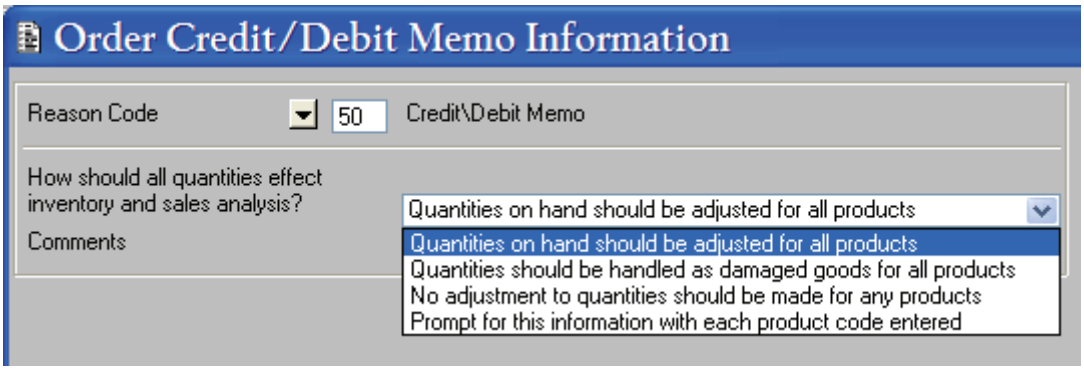


Note the invoice number provided; it will be used while creating the credit memo.

If you do not get this message, then you can edit the order directly; a credit memo will not be necessary.

2. To continue with the memo, perform the **Save As/Copy** function (<F9>), to copy the order.
3. Enter the **Date** for the credit memo and an **Order Code** number or tab through the field to allow the system to assign the order code. If the date is different from the original order date, a dialog box displays: *Do you want to retain the original ticket dates?* Select **`Yes`** or **`No`** as needed. You will also be asked if you want to **Revalidate prices?**; answer No to that one.
4. From the **Order Type** field, select **`Credit Memo`**.
5. Once you select credit or debit memo, the Order Credit/Debit Memo Information screen displays:

Order Credit / Debit Memo Information (EDTPREPU)


Order Credit/Debit Memo Information
Reason Code
50
Credit\Debit Memo
How should all quantities effect inventory and sales analysis?
Quantities on hand should be adjusted for all products
Comments
Quantities on hand should be adjusted for all products
Quantities should be handled as damaged goods for all products
No adjustment to quantities should be made for any products
Prompt for this information with each product code entered

6. If a **Reason Code** is configured specifically for credit/debit memos, it will default; otherwise, detail on the field and select one from the list.
7. Select a **How should all quantities effect inventory and sales analysis?** option.

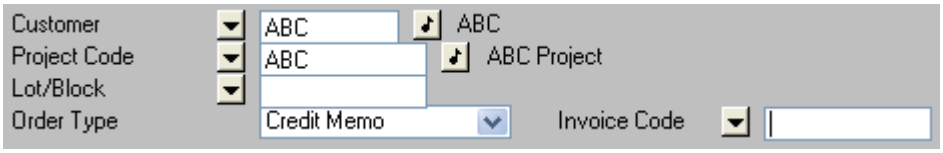
   The inventory/sales analysis adjustment options are as follows:

   - **`Quantities on hand should be adjusted for all products`** - All items appearing on the credit memo will be returned to inventory. Generally used when doing a credit/rebill, when issuing a credit memo for a delivery that never took place, or any credit memo that adjusts the amount of material received by the customer
   - **`Quantities should be handled as damaged goods for all products`** - Items on the credit memo will not be placed into inventory; they will be tagged as damaged goods for inventory and reporting purposes.

- **No adjustment to quantities should be made for any products** - No adjustments are made for any item on the credit memo. Only used for adjustment credit memos, in which you are crediting a customer who has been overcharged.
- **Prompt for this information with each product code entered** - Upon accepting the credit memo, you are prompted for inventory/sales analysis options for all memo items.

8. If necessary, enter **Comments** regarding the background/reason for the memo.
9. **Accept** the screen to return to the main prep screen.

Customer / Project Code segment (EDTPREP)



10. When the **Order Type** is **Credit Memo** or **Debit Memo**, the **Invoice Code** field appears. Enter the Invoice Code on which this order was originally billed. This field links the new credit memo with the original invoice. If this field is left blank, the system creates an open credit memo that must be manually assigned to an invoice at a later date.
11. Remove all products except the one(s) you are crediting. If you are doing a full credit, don't change anything.

    All items remaining on the credit memo, including associated products and charges, will be credited back to the customer. If you do not check the credit memo carefully before accepting, you may inadvertently give a customer material for free. It bears repeating: check the **Total** field at the bottom of the screen—that is the amount that you will be crediting to the customer, and is an easy way to check for errors.
12. **Accept** the Edit Orders and Tickets screen.
13. Use Invoice Print to print the memo and create a sales batch.

Debit Memos

You can create a debit memo to correct for an omitted product charge or inaccurate pricing. The memo appears on printed invoices to show this correction to the customer.

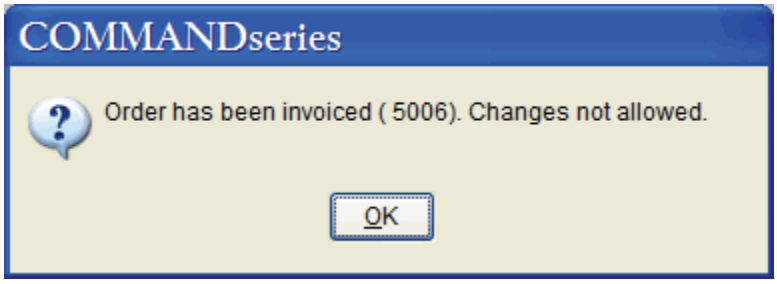
A common use is as part of a "Credit and Rebill;" a credit memo is used to credit the full amount of an order, then a debit memo is used to bill the customer for the correct amount.

To create a debit memo:

1. On the Edit Orders and Tickets screen, enter the **Order Date** and **Order Code** of the order you wish to correct. The rest of the fields automatically fill with previously entered details of the order.

   If the order has already been invoiced, a dialog box will appear:

Invoiced Order

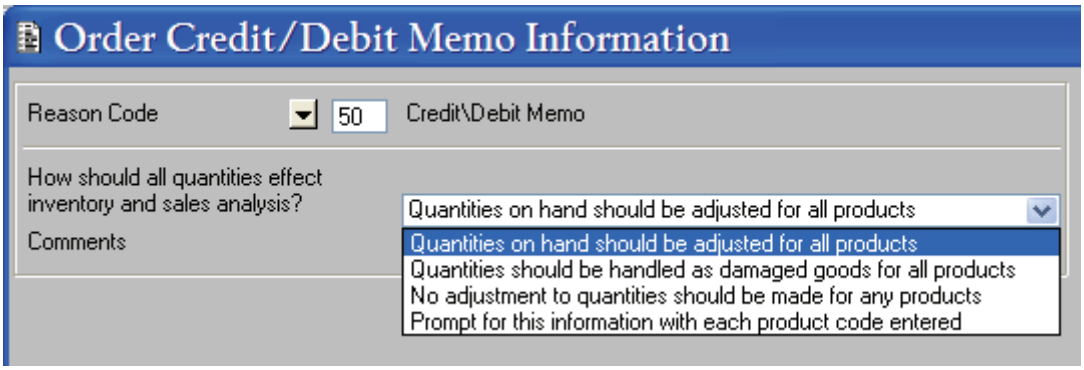


Note the invoice number provided; that will be used while creating the debit memo.

If you do not get this message, then you can edit the order directly; a debit memo will not be necessary.

2. To continue with the memo, perform the **Save As/Copy** function (<F9>), which copies the order.
3. Enter the **Date** for the credit memo and an **Order Code** number or tab through the field to allow the system to assign the order code. If the date is different from the original order date, a dialog box displays: *Do you want to retain the original ticket dates?* Select **`Yes`** or **`No`** as needed. You will also be asked if you want to **Revalidate prices?**; answer No to that one.
4. In the **Order Type** field, select **`Debit Memo`**.
5. Once you select credit or debit memo, the Order Credit/Debit Memo Information screen displays:

Order Credit / Debit Memo Information (EDTPREPU)


Order Credit/Debit Memo Information
Reason Code
50
Credit\Debit Memo
How should all quantities effect inventory and sales analysis?
Quantities on hand should be adjusted for all products
Comments
Quantities on hand should be adjusted for all products
Quantities should be handled as damaged goods for all products
No adjustment to quantities should be made for any products
Prompt for this information with each product code entered

6. If a **Reason Code** is configured specifically for Credit/Debit Memos, it will default; otherwise, detail on the field and select one from the list.
7. Select a **How should all quantities effect inventory and sales analysis?** option.

   The inventory/sales analysis adjustment options are as follows:

   - **`Quantities on hand should be adjusted for all products`** - All items appearing on the credit memo will be returned to inventory. Generally used when doing a credit/rebill, when issuing a credit memo for a delivery that never took place, or any credit memo that adjusts the amount of material received by the customer
   - **`Quantities should be handled as damaged goods for all products`** - Items on the credit memo will not be placed into inventory; they will be tagged as damaged goods for inventory and reporting purposes.

- **No adjustment to quantities should be made for any products** - No adjustments are made for any item on the credit memo. Only used for adjustment credit memos, in which you are crediting a customer who has been overcharged.
- **Prompt for this information with each product code entered** - Upon accepting the credit memo, you are prompted for inventory/sales analysis options for all memo items.

8. If necessary, enter **Comments** regarding the background/reason for the memo.
9. **Accept** the screen to return to the main prep screen.

Customer / Project Code segment (EDTPREP)

10. When the **Order Type** is **Credit Memo** or **Debit Memo**, the **Invoice Code** field appears. Enter the Invoice Code on which this order was originally billed. This field links the new credit memo with the original invoice. If this field is left blank, the system creates an open credit memo that must be manually assigned to an invoice at a later date.
11. Enter the additional pricing information. Check the **Total** field at the bottom of the form to verify the additional amount to be charged to the customer.

    Be sure to remove all information from the invoice that will not be affected by the memo.
12. **Accept** the Edit Orders and Tickets screen.
13. Use Invoice Print to generate the memo and create a sales batch.

Options Menu

The Options menu on the Edit Orders and Tickets screen provides a shortcut to various functions. The Options drop-down menu includes:

- Change Order to Metric
- Ticket Times
- Reprint Tickets
- Display Individual Ticket
- Display Taxes
- Display Multiple Tickets
- Display Haul Charge
- Suspend Order
- Suspend Product
- Edit Suspended Tickets
- Addition/Selection of Notes

- Process Goods Returned

Change Order to Metric/Customary

When an order is retrieved, the system determines if it is a customary or metric order. This menu command lets the user temporarily convert the current order to the other measurement system.

This conversion is done strictly for reference purposes—you will not be able to save a customary order as metric or vice versa.

This functionality is also available on the toolbar.

Ticket Times

When this option is selected, the Time and Task Manager screen displays. The Order Date and Order Code of the current order will be selected. Tabbing through the remaining fields will display all of the tickets for the current order, allowing you to edit all those ticket times at once.

Note: The Time and Task Manager does not display tickets created in prep.

Reprinting Tickets

This function only reprints existing ticket information; it does not re-calculate or update any information in the files.

The Reprint Tickets function is available in the Options menu in all ticketing screens as well as Edit Orders and Tickets. The functionality of the screen depends on the screen from which it was called.

To reprint a current ticket:

If tickets are printed from the batch computer, this option will restack the ticket.

1.
2. Enter the **Order Date**, and select the appropriate **Order Code**.
3. From Order Entry, press the **Ticket** button to open the Concrete Ticketing & Shipping screen. From the Edit Orders & Tickets screen, go to the next step.
4. From the Options menu, select **Reprint Ticket(s)** to open the Reprint Tickets screen.

   The above graphic lists all form fields. Some fields will not display, depending on your selections.
5. If the screen was displaying an order, that order date and code will be passed to the reprint screen. If the screen was blank, then enter the Order Date and Order Code associated with the ticket(s) to be reprinted.
6. Select **Print all Tickets on Order** or specify a **Ticket Code** or range of codes.
7. If the Reprint Tickets screen has been called from Edit Orders and Tickets, you may only **Print to** a standard local or network printer.
8. Enter an appropriate **Document Format**, or detail on the field to select from a list.
9. **Accept** the screen to reprint the ticket(s).

To reprint to a plant printer:

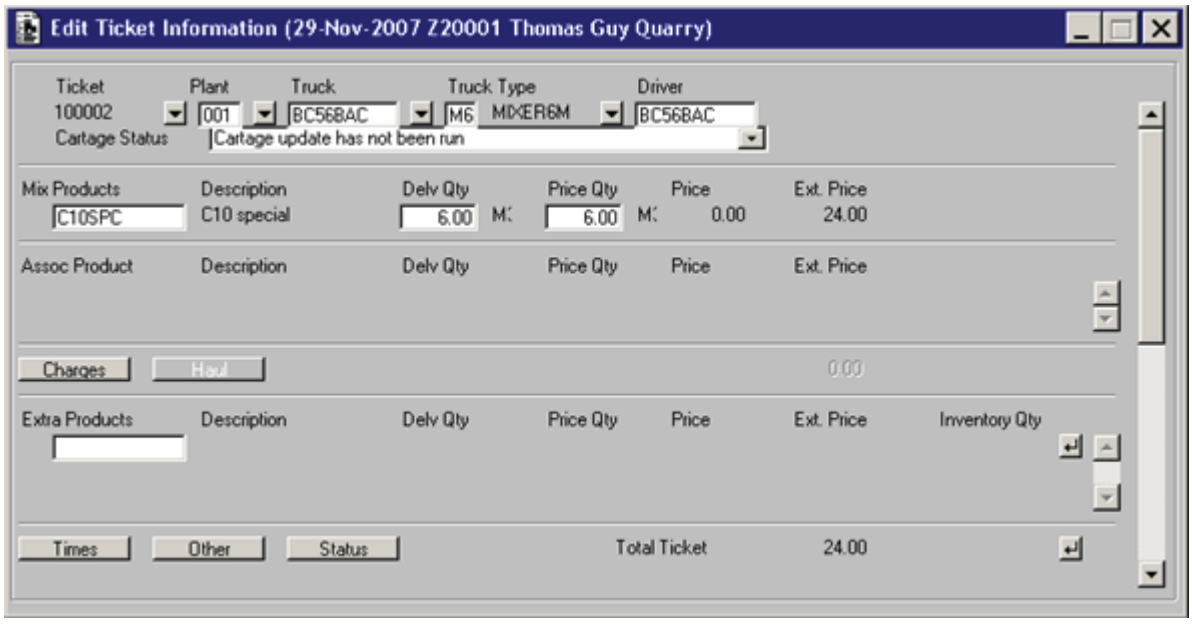
You can only print to a plant printer if the reprint screen is called from .

1. Enter the **Order Date**, **Order Code**, and **Ticket Code**(s) as above.
2. Select **`Plant Printer`** in the **Print to** drop-down field. The lower portion of the screen will activate.
3. Specify a **Plant Code**. The reprint ticket will be sent to that plant's default ticket printer.
4. If the specified order is an aggregate order, the **Scale Number** field will display. Select the scale from the drop-down list.
5. Once the plant or plant/scale has been selected, select the plant printer to be used from the drop-down list.
6. If the selected plant is configured for plant and/or dispatch copies, corresponding checkboxes will display (defaulting as checked). Adjust if necessary.
7. **Accept** the screen to reprint the ticket(s).

Display Individual Ticket

This toggle switch controls how tickets are presented on the Edit Ticket Information screen. If this option is selected, the Edit Ticket Information screen will display a single ticket at a time.

Single Ticket Display (EDTPREP6)



All products are displayed on the main form; additional information remains under buttons.

Selecting this option does not result in a permanent display change. If the current order is closed and reopened, the Edit Ticket Information screen will revert to the multi-ticket format.

Note: Individual Ticket Display is not available for aggregate orders.

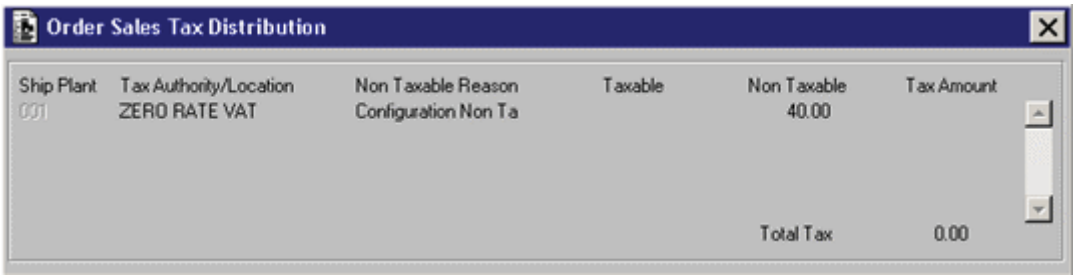
Display Taxes

The Display Taxes functions provides a convenient means of reviewing the sales tax charged on a particular order. Taxes cannot be adjusted on this screen.

To display order tax information:

1. Retrieve the order in Edit Orders and Tickets.
2. Select the **Display Taxes** option {Options > Display Taxes}.

Order Sales Tax Distribution (EDTPREPK)



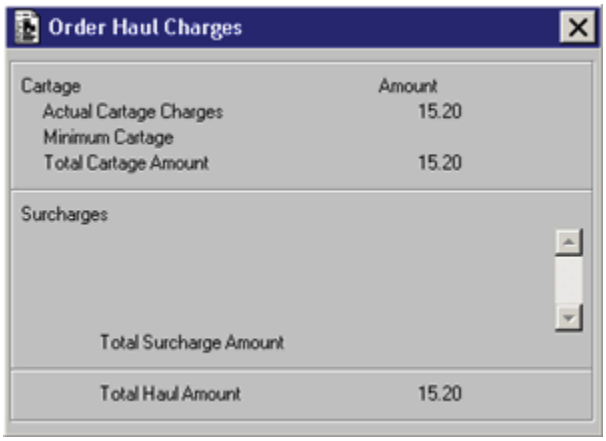
The screen provides totals by Tax Authority/Location. If changes are made to the tax status of any part of the order, the effect can be reviewed immediately.

Display Haul Charges

This option displays the Order Haul Charges screen, which provides an easy-to-read summary and total of all cartage charges and surcharges related to the order.

This information can be useful when working with pricing that combines material and delivery prices.

Order Haul Charges screen (EDTPREPS)

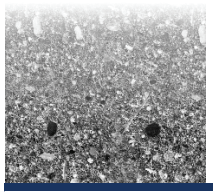


Suspend Order/ Suspend Product/Edit Suspended Tickets

These three options relating to suspension of orders, products, or tickets are discussed in ”Suspending Orders and Tickets” on page 199.

Addition/Selection of Notes

This option calls the Notes editor. Please see the section on Notes for complete information.



Daily Invoicing

In COMMANDseries, a dispatcher creates orders and tickets with the Dispatching function of COMMANDconcrete and COMMANDaggregate. The next day, that order and ticket information can be reviewed and edited if necessary, in preparation for invoicing.

The procedure for preparing orders and tickets for invoicing involves printing preliminary registers, editing orders and tickets, and printing final invoices. Preliminary reports and the Edit Orders and Tickets function are used to check and correct order and ticket information before the printing of invoices. In some companies this task falls to invoicing clerks, in others it falls to dispatchers. It is for the latter group that these tools are included in the COMMANDconcrete and COMMANDaggregate modules.

The title of this chapter refers to "daily invoicing" because it is most efficient to invoice on a daily basis. By getting transactions through the system as quickly as possible, you improve cash flow and quickly identify potential problems with orders and tickets from previous days.

The same procedures discussed in this section can also be used to invoice on a weekly or monthly basis. When invoices are printed on a weekly or monthly cycle, the general pattern is to reconcile, update, and review orders and tickets on a daily basis, so that all orders are fully prepped when invoicing day arrives.

Topics in this section:

Reconciling Tickets
Price Updates
Update Costs & Prices for Orders & Tickets
Calculate Unloading Charges
Create Orders for Separate Invoices
Price Review
Invoice Print (if licensed)
Post to Receivables (if licensed)
Plant-level Invoices for Cash Sales

Process Overview

This chapter is organized around a typical invoice cycle. The standard invoicing process is as follows:

Reconciling Tickets

1. Run a Summary Ticket List to account for all tickets issued.

Price Updates

2. Update Cost and Prices for Orders and Tickets.

3. Create Unloading Charges (if applicable).
4. Create Orders for Separate Invoices (if applicable).

Price Review

5. Review product pricing (Priced Orders Report/Detail Preliminary Invoice Register).
6. Edit Orders and Tickets (if necessary).
7. Update tickets for Cartage (if applicable).
8. Run an "Exception Items Only" report to verify all orders are priced.

Invoice Print (if licensed) (if licensed)

9. Run a Detail Preliminary Invoice Register or Priced Orders Report.
10. Print Invoices and verify they've printed correctly. Update.
11. Run Final Invoice Register (Summary). Balance Final Invoice Register to Priced Orders Report or Preliminary Invoice Register.

Post to Receivables (if licensed)

12. Run a Detail Sales Transactions Register. Check all entries, especially GL Distribution Entries.
13. Post Transactions.

This list assumes you use both COMMANDinvoicing and COMMANDreceivables. If you use a third-party A/R package, you will export the data from COMMANDinvoicing and import it into your system. This export process will be discussed in a separate section.

Reconciling Tickets

At the end of a business day, you have large stacks of tickets that the drivers have returned from their deliveries. The first step of the invoicing process is to reconcile these hard copy tickets to the ticket records within COMMANDseries. The goal of reconciling tickets is to physically account for all tickets generated by COMMANDseries.

The Ticket Report is not available from COMMANDinvoicing, but is available in the Dispatching menu for both COMMANDconcrete and COMMANDaggregate. This report generates a list of tickets for a specified range. It is a single-line report that shows basic information about each ticket. The report can be sorted by ticket code, order code, shipping plant code, or a list of other selections (i.e., order date, ticket code, hauler code, etc.).

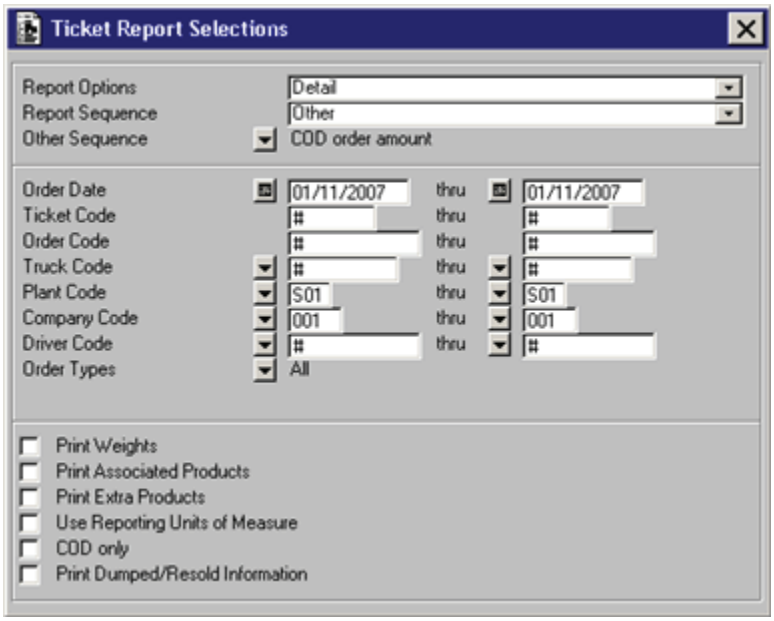
The person(s) responsible for reconciling tickets varies from company to company. Some companies have plant managers reconcile tickets for individual plants, while some companies have billing clerks reconcile tickets. Regardless of who does it, the goal is the same: to account for all printed tickets.

The following instructions are for COMMANDconcrete and COMMANDaggregate users. If you use another dispatching program, you must review the ticket information from your system to check the order and ticket information for any needed edits.

To print a ticket report:

1. Open the **Ticket Report Selections** screen in COMMANDconcrete or COMMANDaggregate {Dispatch > Dispatching Reports > Ticket Report}.

Ticket Report Selections (SELTICK)



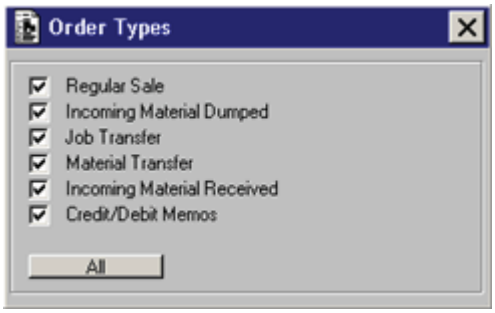
2. Select the **Report Options**. This field is used to specify what type of ticket report you wish to generate. The valid options are:
   - **Detail** — Prints virtually all information related to each ticket.
   - **Summary** — Prints the minimal, vital statistics for each ticket in a single line format. This option is most appropriate for initial ticket reconciliation, since the only goal is to account for the tickets.
   - **Missing Tickets** — This report identifies gaps in the ticket number sequence. Such gaps can indicate that someone has tampered with the database.
3. Select the **Report Sequence**. This field specifies how to sort the report. You can sort the report in one of the following ways:
   - Ticket Code
   - Order Code
   - Plant Code,Order Code
   - Plant Code,Ticket Code
   - Other

   If you select `Other`, the **Other Sequence** field will activate. You can then click on the detail button to display a dialog that contains a scrolling list of other report selection options. These include such options as sorting by order date, ticket code, hauler code, etc. The options here are restricted to fields within the ticket record.
4. Enter the **Order Date**. This specifies a range of ticket dates to be included on the report. The order date is the only required selection criterion on this report.
5. To specify particular tickets, enter a **Ticket Code** or range of ticket codes.

6. To specify tickets on particular orders, enter an **Order Code** or a range of order codes.
7. To specify tickets for a particular truck, enter a **Truck Code** or range of truck codes.
8. Enter a **Plant Code** or range of plant codes. This specifies which tickets you want on the report based on the ticket's shipping plant.
9. Enter a **Company Code** or range of company codes. This specifies which tickets you want on the report based on the companies to which the ticket belongs. This is dictated by the order's pricing plant, shown in the **Price Plant Code** field on the **Order Pricing Information** screen {Dispatch > Orders > Pricing}.
10. Enter a **Driver Code** or range of driver codes. This specifies which tickets you want on the report based on the driver code. This is the driver code shown in the **Driver Code** field on the **Concrete Ticketing & Shipping** screen {Dispatch > Concrete Ticketing & Shipping}.
11. Select an **Order Type**(s). This option specifies which tickets you want on the report based on the order type. This is the order type shown in the **Order Type** field on the Order Entry screen {Dispatch > Orders}.
    - **Regular Sale** represents all orders for which shipments are made and for which invoices will be created. This may include both trade and some inter-company customers.
    - **Incoming Material Dumped** represents material dropped off for disposal.
    - **Job Transfer** accommodates the shipment of inventoried materials to job sites for inter-company, construction related activity. A "Job Cost Phase" code {Files > General Information > Job Cost Phase} will be associated with the order to accommodate the needs of the construction job cost environment. No invoicing will be associated with this order type.
    - **Material Transfer** is used for shipping inventoried materials to an inter-company plant or business. No invoicing is involved.
    - **Incoming Material Received** represents incoming inventory material.
    - **Credit/Debit memos** represent a credit/debit against the customer's account.

    The default value is **All**:

Order Types (SELORTP)



12. Select **Print Weights** to print constituent products weights included in mix products for each ticket.
13. Select **Print Associated Products** to print the associated products for each ticket.
14. Select **Print Extra Products** to print the extra products for each ticket.

15. Select **Use Reporting Units of Measure** to indicate that products will be represented in the Total section of the report only if they have a valid unit of measure code in the **Reporting Unit of Measure** field identified on the Items editor {Files > Item Information > Items}. Otherwise, only ready-mix products are represented in the total section. Using reporting units of measure acknowledges that other types of products (aggregate, sand, cement, etc.) may be sold through the COMMANDconcrete application. The totals for those products can then be represented in the report's total section.
16. Select **COD only** to feature only COD ticket items on the report.
17. Select **Print Dumped/Resold Information** to print any ticket information regarding dumped concrete or resold concrete.
18. **Accept** the **Ticket Report Selections** screen.
19. Select a print model from the **Possible Print Models** screen.
20. Select a print destination. If the selected print model has a **Print Device** setting of **`Prompt`**, a Windows dialog box will appear in which you can specify a printer.

Price Updates

These routines provide for some general price and order updates prior to formal pricing review. These routines will not eliminate mistakes, but provided that the system is correctly configured, they will reduce the chance of a mis-priced order.

- Update Costs & Prices for Orders & Tickets
- Calculate Unloading Charges (if applicable)
- Create Orders for Separate Invoices (if applicable)

Update Costs & Prices for Orders & Tickets

Many variables enter into assigning costs and prices to individual items. Because of the many ways a company can manage cost information in the system, COMMANDseries ticketing routines do not create ticket-level cost records. This update routine populates the ticket/order-level cost fields with the most current cost information. That cost information then becomes available through Invoicing Reports and through Executive Reports. Customers running COMMANDexecutive should use the update costs option to ensure that all orders are assigned the correct price.

Prices are attached to an order at the time the order is entered in the system. Because of the delay that can occur between the time a salesman gives a customer a price and the time that new price gets entered into the system, it's possible that an order can get priced based on out-of-date information. The update price option offers a useful safety net for this occurrence.

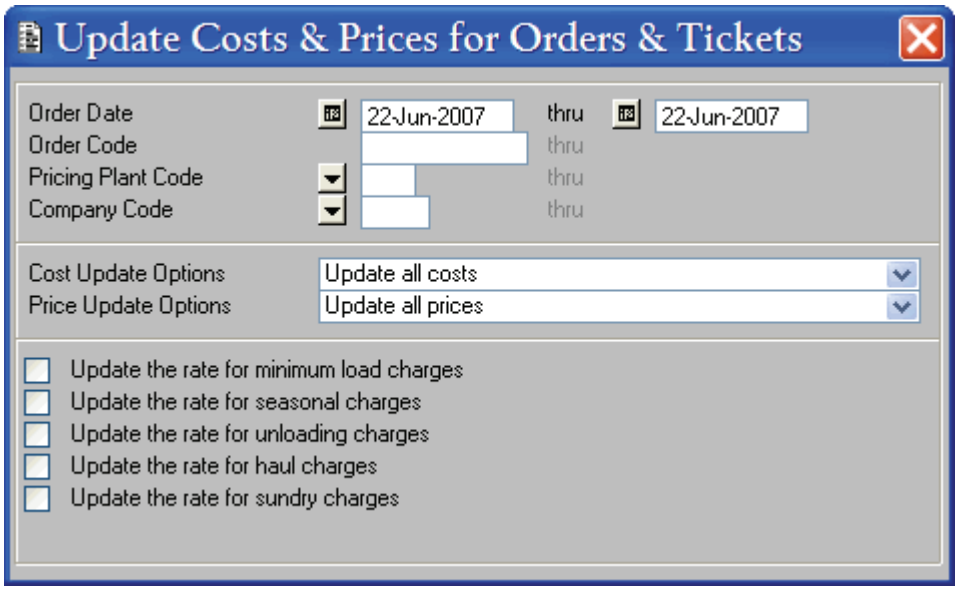
The update routine lets you update costs, prices, or both.

Caution: The update does not revalidate using standard pricing logic, but instead revalidates using each item's Price Source Code (PSC) to see if a more current price is available from that source. So, if an order gets priced from the Item Master list, and then the next day the salesman enters project-level pricing, the update prices option would not find an updated price. In that case, you would need to open the order in **Edit Orders and**

Tickets, remove the project from the order, and then add the project back; at that point, standard pricing rules will be used and the correct price(s) will be pulled from the project file.

To update costs & prices on orders & tickets:

1. Go to the **Update Costs & Prices for Orders & Tickets** screen {Invoicing > Update Costs & Prices for Orders & Tickets}.
2. Enter selection ranges for **Order Date**, **Order Code**, **Pricing Plant Code**, and/or **Company Code**. If a selection is left blank, the system will not filter by that selection. If no pricing plant codes are specified, for example, the system will update orders from all pricing plants within the range established by the other parameters.



3. Select the **Cost Update Options**. The choices are:
   - Update all costs
   - Update zero costs
   - Do not update costs
4. Select the **Price Update Options**. The choices are:
   - Update all prices
   - Update zero prices
   - Do not update prices
5. If a **Price Update Option** other than **Do Not Update Prices** is selected, additional checkboxes will display in the lower half of the screen. These checkboxes let you determine if pricing for extra charges is to be updated as well. Options are:
   - Update the rate for minimum load charges
   - Update the rate for seasonal charges
   - Update the rate for unloading charges
   - Update the rate for haul charges

- Update the rate for sundry charges
- Update All Override Rates

Note: Update All Override Rates is only available when **Update the rate for haul charges** is selected.

6. **Accept** the **Update Costs & Prices on Orders & Tickets** screen to initiate the updates. The time needed for the update will vary based on your system and the size of your database. The system will not provide a report of the costs/prices that were updated.

Calculate Unloading Charges

Unlike charges such as Minimum Load or Sundry charges, Unloading Charges cannot be created when a load is ticketed. During ticket prep, the Calculate Unloading Charges function is used to create unloading charges based on the recorded ticket times.

The routine generates a report that lets you review the calculated unloading charges before applying them.

COMMANDseries can automatically calculate and apply unloading charges. See the **Setting Up the System** manual for details on creating Unloading Charge tables and automated calculation profiles.

To calculate unloading charges:

1. Go to the **Calculate Unloading Charges** screen {Invoicing > Calculate Unloading Charges}.
2. Define the range of information for which to calculate the unloading charges in the **Order Date**, **Order Code**, **Customer Code**, **Project Code**, **Pricing Plant Code**, and **Company Code** fields.
3. Mark any necessary checkboxes at the bottom of the screen to calculate unloading charges using the ticket, order, or project calculation method.
   When calculating unloading charges by project, a new order must be created for the unloading charges.
4. **Accept** the screen.
5. Select a print model from the **Possible Print Models** screen.

   The system will generate a report showing all orders that qualify for an unloading charge.
6. If the information on the report is correct, answer **Yes** to the dialog box that follows the report. The unloading charges will be automatically added. The charges will be added to individual tickets, as specified in the appropriate charge table.

   If the information is incorrect, answer **No** to the dialog box that follows the report. The unloading charges calculated on the report will not be written to the database. However, you may have to do one of the following:
   - Correct any ticket times that are incorrect.
   - Verify that the correct unloading charge table is assigned to each order and that the **Apply Unloading Charges** flag is selected on the order. The customer or project information may need to be updated as well, so that future orders are correct.
   - Verify that the unloading charge table is configured correctly.

Accepting the charges is an all or nothing proposition; you cannot accept or remove individual charges from the list. If you see some charges that you do not want to issue (for a favored customer, for example) you have two choices:

- Cancel all charges, edit the relevant orders so that they are no longer subject to unloading charges, and re-run the **Create Unloading Charges** function.
- Apply all charges, then edit the relevant orders to remove the charges before invoicing.

An alternative means of using this feature is as follows:

1. Configure and print the update report.
2. Answer **No** to the update inquiry.
3. Review the report.
4. If the report is fine, rerun the report, send the report to the screen, and then answer **Yes** to the update prompt. If you find problems, retrieve the order in **Edit Orders and Tickets** and correct the issue, then rerun the update.

Create Orders for Separate Invoices

Some customers prefer to have additional charges invoiced apart from the deliveries themselves. Customer and Project files have flags on the Pricing tabs that enable the creation of separate orders for different charges. These new orders can then be invoiced normally. This function lets you create orders for these separate invoices for any given day.

To create orders for separate invoices:

1. Go to the **Create Orders for Separate Invoices** screen {Invoicing > Create Orders for Separate Invoices}.
2. Enter a range of dates in the **Order Date** field.
3. Enter the **Order Sequence**. Click on the detail button in the field to access the Choices screen.
4. **Accept** the **Create Orders for Separate Invoices** screen.
5. The system will create orders, complete with tickets containing nothing but the flagged charges. Those charges will be removed from the original orders. These new orders can then be invoiced according to company policy.

Price Review

Once the updates are out of the way, standard pricing review can begin. The specifics of pricing review will vary from company to company. There may be one person in the billing office who reviews everything, or various sales representatives who review the pricing for their customers.

- Run a Priced Orders Report/Preliminary Invoice Register
- Review product pricing
- Edit Orders and Tickets as needed
- Run Exception Items Only Report
- Update Cartage Tickets

Run a Priced Orders Report/Preliminary Invoice Register

A full discussion of the Preliminary Invoice Register can be found on page 188. Very simply, you run the report and review the prices.

That basic pattern may vary, depending on the size or structure of the company. If the company does both concrete and aggregate work, one person may review concrete orders while another reviews aggregate orders. In that case, use the **Product Line** field to run two separate reports.

If pricing is reviewed by the sales reps, then run the report for each **Salesman**. In a multiple company situation, the report can be run by **Company**.

When a pricing error is discovered, attempt to determine the source of the error. The Preliminary Invoice Register and the Priced Orders Report both include price source codes (PSC) for all prices, making the search easier. By identifying and correcting the source of a pricing error, you can prevent the error from occurring in the future.

Edit Orders & Tickets

Using the results from the price review, edit the orders and tickets as needed. Please see the Edit Orders & Tickets section on page 205 for full details.

Update Cartage Tickets

The Update Tickets function reads delivery ticket data from related COMMANDseries applications. Charges cannot be applied in cartage without a related ticket. After reading the tickets, COMMANDcartage uses the necessary information to compute and store pertinent cartage information. COMMANDcartage creates cartage charges on those same tickets, and creates appropriate payment information for the relevant haulers.

To update tickets:

1. Go to the **Update Cartage Tickets** screen {Cartage > Update Tickets}.
2. Enter the **Order Date**, or range of dates, for the tickets you are importing for update.
3. Enter the **Ticket Code**, or range of codes, for the tickets you are importing for update.
4. Enter the **Order Code**, or range of codes, relevant to the tickets you are importing for update.
5. In the **Cartage Rate Table** field, select the cartage rate table to be used as extra selection for updating. If the code is entered, only haulers using this rate table will be posted to the cartage system.
6. Check the **Replace Existing Cartage Information** checkbox to remove any existing tickets and replace them with the current import.

   Note: To add new tickets to the existing tickets, leave this checkbox unchecked.
7. Select the **Include Removed Tickets in Cartage Calculations** field if necessary.
8. **Accept** the **Update Cartage Tickets** screen.

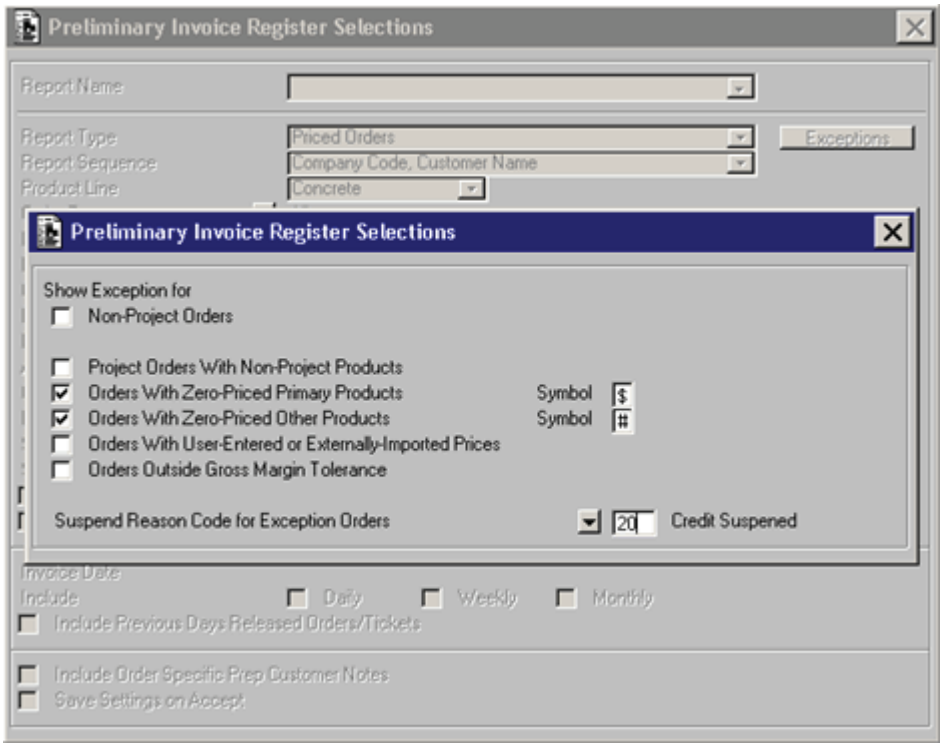
Zero-priced Exception Items Only Report

At this point in the process, every order should have been checked, and every product should be priced, but before printing invoices, it's a good idea to make one last check to make sure that everything at least has a price on it.

Run an Exception Items Only report, configured to look only for zero-priced products, as shown below. For more information on Exception Reports, see "Printing an Exceptions Report" on page 192.

Entering a **Suspend Reason Code for Exception Orders** suspends all the orders that are flagged as exceptions.

Preliminary Invoice Register Selections screens for Zero Priced Items Only Report



If all items have a price, then when this report is run the system will return with the message "No Records to Process!":

If this message is displayed, all orders in the specified range have a price. If the system does generate a report, edit the orders listed in the report to ensure that all products are priced.

Invoice Print (if licensed)

Preliminary Detail Invoice Register

At this point in the process, this report may have already been run multiple times, but no matter how many times this report (or its counterpart, the Priced Orders Report) has been run, it should be run one last time immediately prior to invoicing. This last register will serve as a balancing benchmark—after invoicing, the results will be compared to the Final Invoice Register. If the two reports balance, then it is unlikely that any errors occurred during the invoice run.

For more information see "Printing a Preliminary Detail Invoice Register" on page 193.

Printing Invoices

The complete discussion of Printing Invoices can be found on page 57 of the COMMANDinvoicing user guide.

Final Invoice Register

The totals pages of the Final Invoice Register should match those from the Preliminary Invoice Register printed immediately prior to invoicing.

If problems are discovered, compare the details of the preliminary and final registers until the discrepancy is found.

Post to Receivables (if licensed)

For a complete discussion of this process, please refer to the COMMANDreceivables User Guide.

Plant-level Invoices for Cash Sales

Some companies are required to provide a pro forma invoice/receipt for cash sales at the time of the sale. To accommodate this requirement, COMMANDseries can print a cash invoice from the Ticketing screen. In addition, the standard invoicing process has been modified to allow greater flexibility invoicing cash sales.

To use this feature, the system must be licensed for the following options:

- Order Entry & Ticketing (OE-CC or OE-CA)
- Cash Management (CM)
- Pricing & Prep (PP)
- Invoicing (IG)

Configuration

Special configuration is only needed to enable ticketing cash sales at the time of ticketing. Configuring a system for this feature involves two things:

- Creating/selecting a document format group for the cash invoices

- Enabling the printing of cash invoices on a plant-by-plant basis

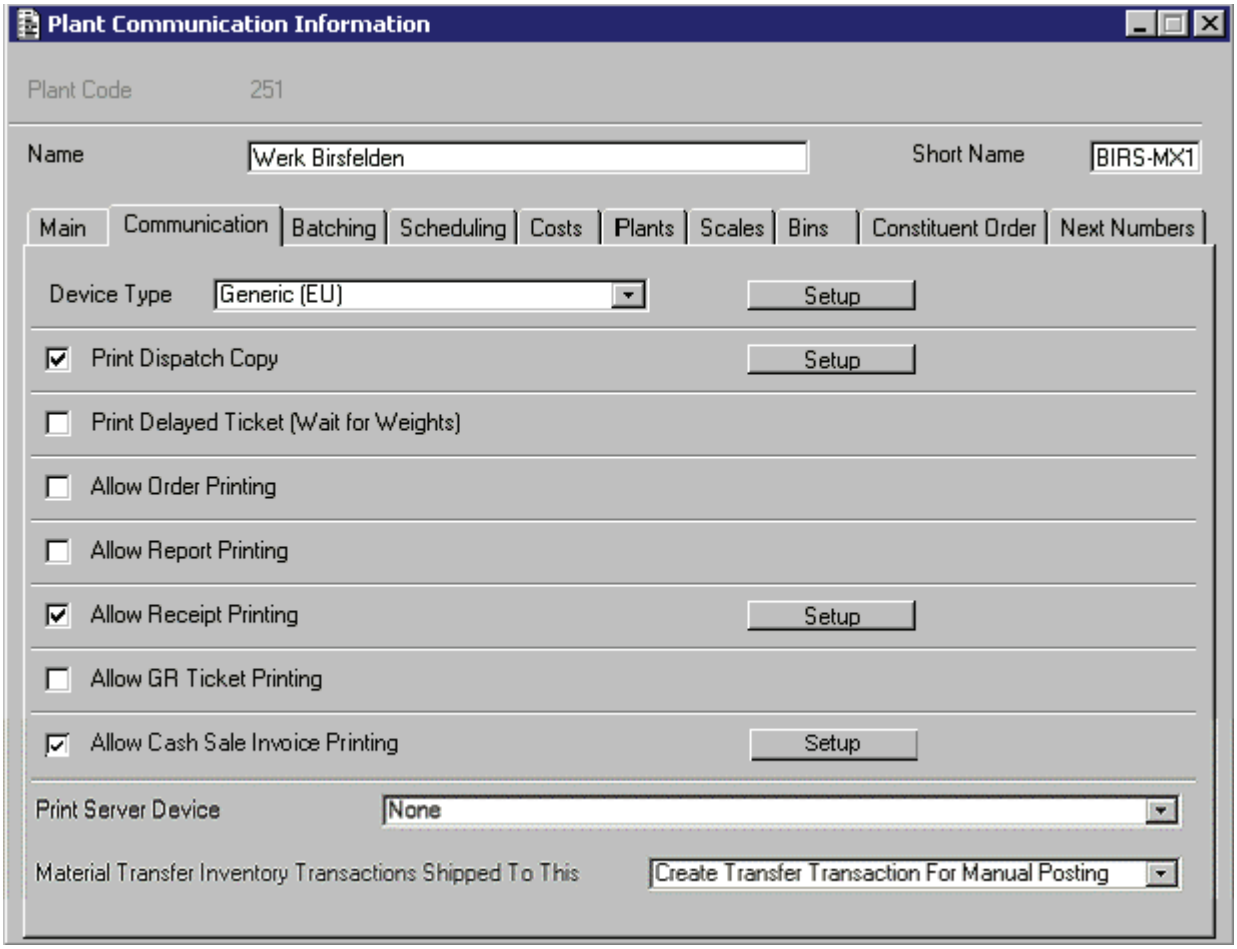
Document Format Group

The document format group should be created using the standard invoice print document tags.

Plant Configuration

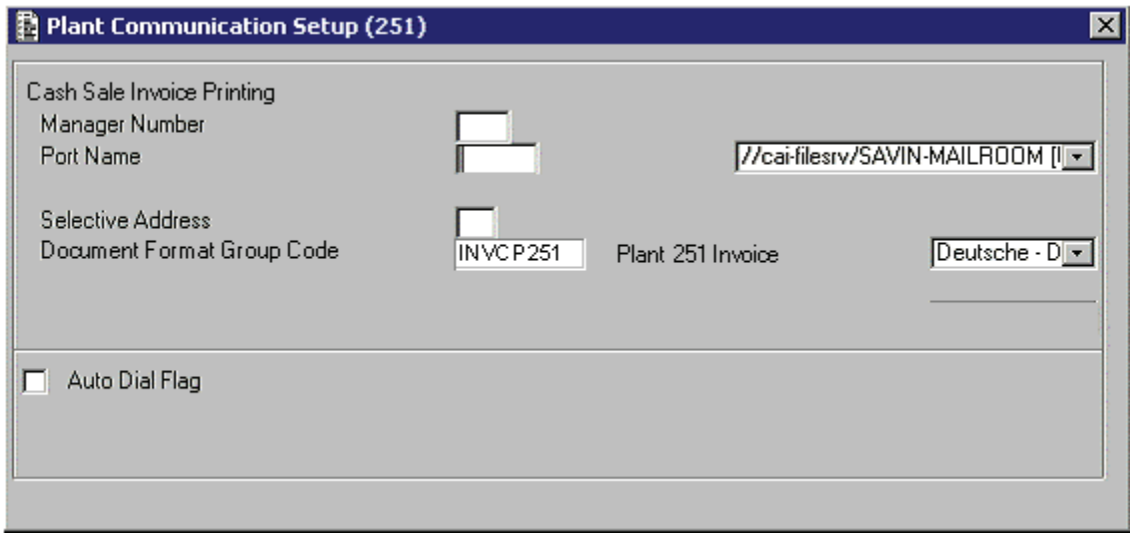
A new field, **Allow Cash Sale Invoice Printing**, has been added to the Plant > Communications tab:

Plant-Communications tab



Selecting that checkbox will display the associated **Setup** button, which calls the Plant Communications Setup screen:

Plant Communications Setup screen



Configure the invoice printer the same way you would configure any other plant printer.

Operations

The Cash Invoicing feature is designed for two different situations:

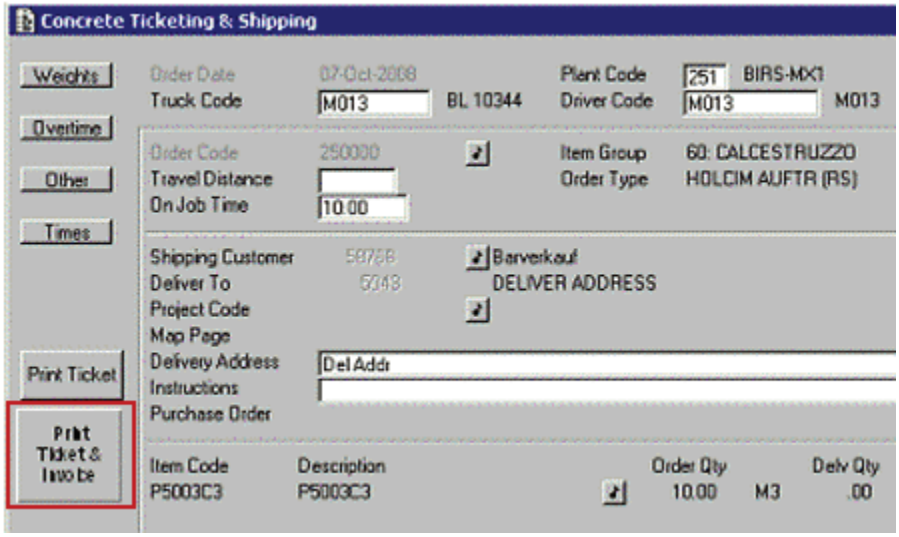
- Invoicing cash sales at the time of ticketing
- Invoicing cash sales at a later date

Invoicing at Ticketing

The Concrete Ticketing & Shipping form has been updated to display a **Print Ticket & Invoice** button under the following conditions:

- The plant is enabled for Cash Sale Invoice Printing.
- The current order has a cash-based Payment form.

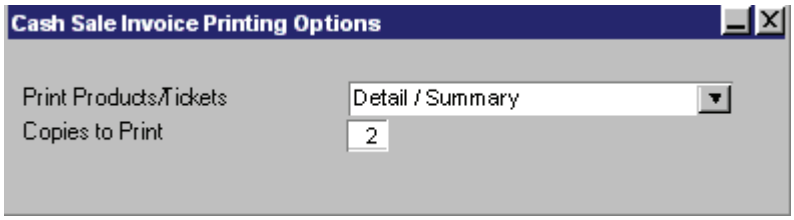
Concrete ticketing



If a ticket is recalled and has not been invoiced, the button will display as **Print Invoice**. If a ticket has been recalled and the invoice has been printed, the button will not display.

When the **Print Ticket & Invoice** (or **Print Invoice**) button is pressed, the Cash Sale Invoice Printing Options screen displays:

Cash Sale Invoice Printing Options



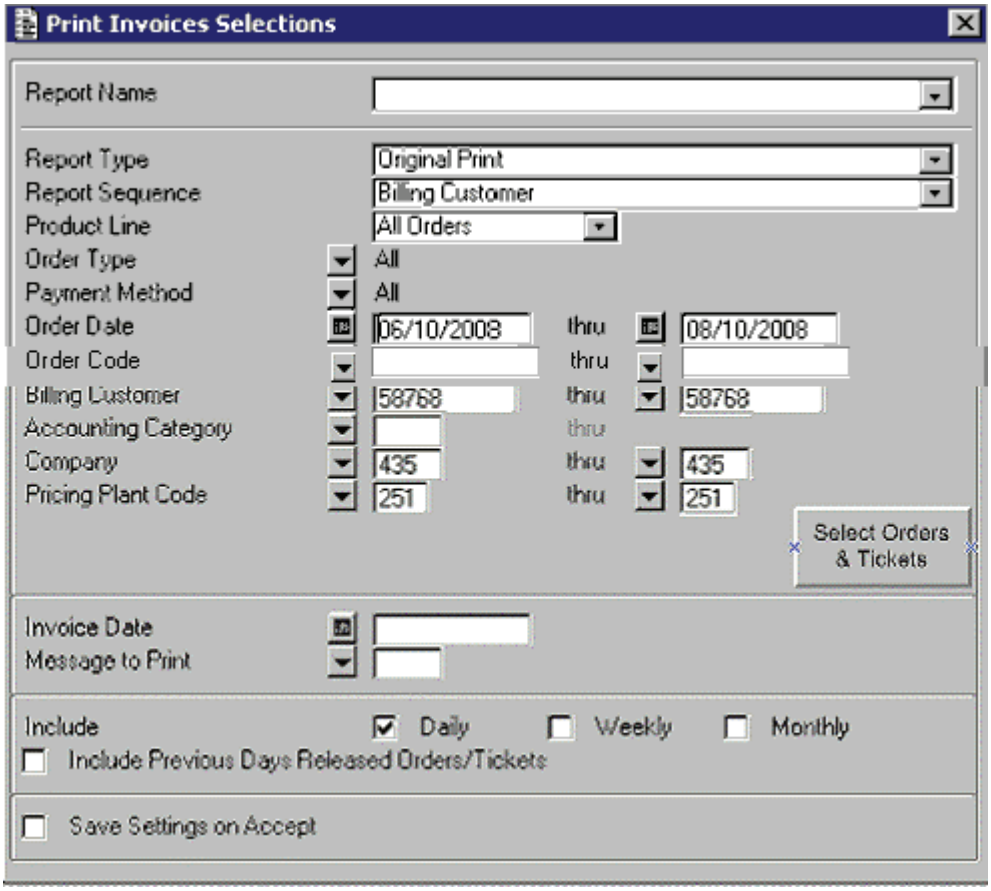
Set the options and **accept** the screen to print the invoices.

Invoicing Cash Sales via Standard Invoicing

This option is only available for plants that are not configured to print invoices at ticketing.

The standard Invoice Print screen has been updated to allow greater flexibility in the invoicing of cash sales.

Updated Invoice Print Selections screen

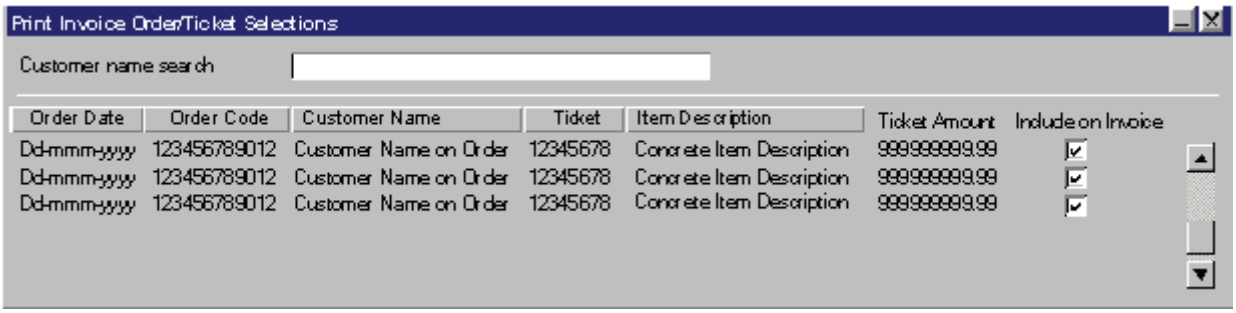


There have been two key changes to the Print Invoice Selections screen. These options only display when a single customer is specified and the **Report Type** is **`Original Print`**.

Order Code allows the selection of a single order or range of orders. Detailing on the field will call a list of uninvoiced orders for the specified customer.

The **Select Orders & Tickets** button calls the Print Invoice Order/Ticket Selections screen.

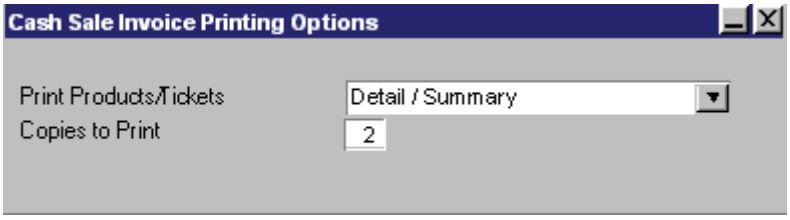
Print Invoice Order/Ticket Selections screen


Print Invoice Order/Ticket Selections
Customer name search
Order Date
Order Code
Customer Name
Ticket
Item Description
Ticket Amount
Include on Invoice
Dd-mmm-yyyy 123456789012 Customer Name on Order 12345678 Concrete Item Description 99999999.99
Dd-mmm-yyyy 123456789012 Customer Name on Order 12345678 Concrete Item Description 99999999.99
Dd-mmm-yyyy 123456789012 Customer Name on Order 12345678 Concrete Item Description 99999999.99

When the screen opens, it will automatically load any uninvoiced orders/tickets that match the specified criteria on the selections screen. Because the Print Invoice Selection screen filters by billing customers, it is possible to get a list that includes multiple customers; if necessary, you can use the **Customer Name Search** field to refine the list.

Select the **Include on Invoice** checkbox for all tickets to be included on the invoice, and accept the screen. The Cash Sale Invoice Printing Options screen displays:

Cash Sale Invoice Printing Options



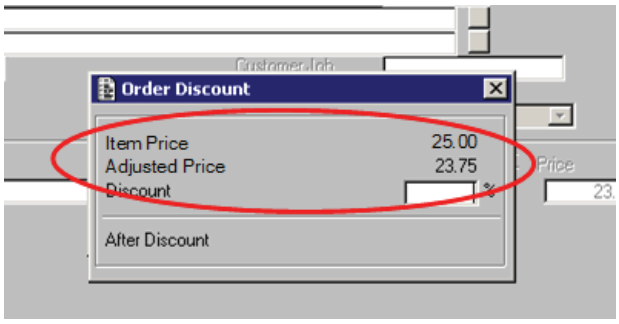
Set the options and accept the screen to begin the invoice process. You will be prompted for a print model and to update records as usual.

Order Discount Form

Detail on the **Order Line Price** (or **Associated Product Price**) field for individual item discounts, or from the **Order Product + Charges** field for discounts to the entire order, to display the Order Discount form in Order Entry.

- When brought forth from the **Order Line Price** field, the form displays as below:

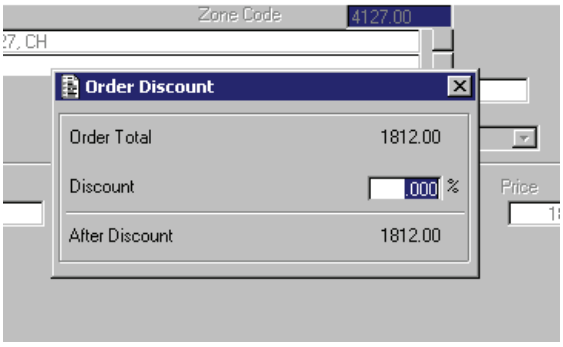
Order Discount Screen



- The **Item Price** represents the list price from the Item Master table.
- The **Adjusted Price** represents the list price, minus any trade discount and/or zone adjustments per the settings in the Customer or Project record.

- When brought forth from the **Order Product + Charges** field, the form displays as below:

Order Discount Screen



Previously entered discounts will display on the Order Discount form and will show how the discount was applied against the original sales prices or totals, as well as the resulting price/total. If a different discount percentage is entered on the Order Discount form, it is always applied to the original price/total to compute the new **After Discount** price/total.

When entering a discount on the **Order Product + Charges** field, each individual item and charge is discounted. It is at this point (or when a discount is entered on the **Order Line Price** field) that the discount is measured against the user's Discount Levels (which are set on the Users > Discount Levels tab). The Configuration rule for determining the User Price Latitude is also taken into account at this time:

- If the **Compute User Price Latitude After Discount** field {Configuration > Projects/Quotes tab} is set to **Disabled**:
  - The user discount will not be computed after the Trade Discount/Zone Adjustment.
  - The entered discount will be calculated against the Item Price.
- If the **Compute User Price Latitude After Discount** field {Configuration > Projects/Quotes tab} is set to **Enabled**:
  - The user discount will be computed after the Trade Discount/Zone Adjustment.
  - The entered discount will be calculated against the Adjusted Price.

Cash Management

The Cash Management option provides a means for managing COD payments for COMMANDseries users who do not have the AR modules. It has several key features:

- Quick Customer creation
- Payment Entry integrated with both order entry and ticketing
- Automatic and manual allocation of payments to tickets
- Cash Reconciliation
- Reporting

Configuration

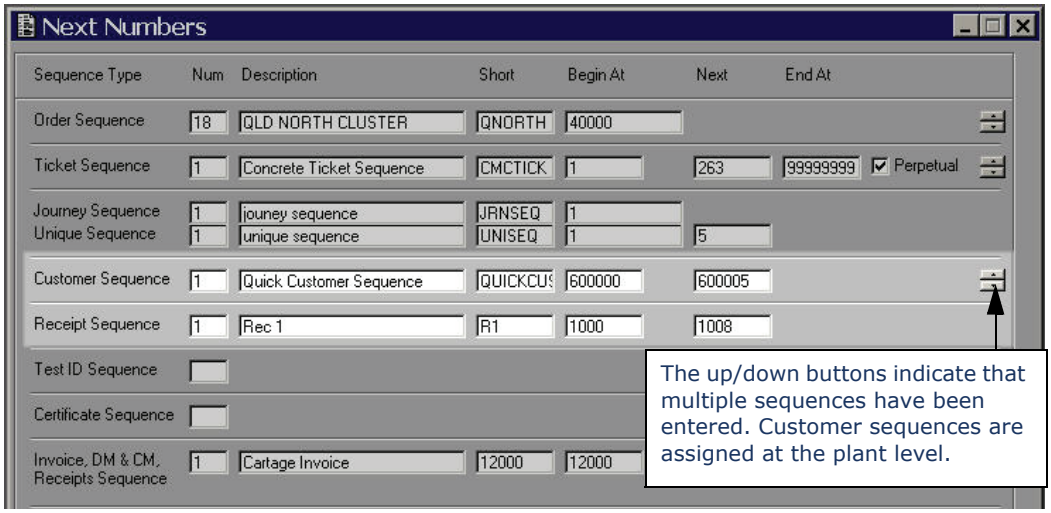
Above and beyond standard configuration requirements, there are five areas that must be configured to implement Cash Management:

- Next Numbers
- Bank Codes
- Contact Types/Contacts
- Plants
- Users

Next Numbers

Two next number sequences impact cash management:

Next Numbers editor (EDTNEXT)



- **Customer Sequence** is used to assign customer codes to customers created using the Quick Customer Entry function in Order Entry. (Quick Customer Entry is used to facilitate one-time cash customers.)
- **Receipt Sequence** is the sequence used to assign receipt numbers to receipts generated during order entry.

Both sequences require the same information:

- **Number** –The sequence number.
- **Description** –The long description of the sequence. You may have separate sequences for each plant, for example.
- **Short** – The short description
- **Begin At** – Identifies the starting point for the sequence. If you have multiple receipt sequences, make sure that there is enough separation–based on your business–to ensure that it will be a long time before one sequence overlaps another. For example, 100 and 200 are probably not good starting points, but 10000 and 20000 probably are.
- **Next** – Indicates the next number in the sequence, and will be incremented automatically. It should only be changed to reset the sequence.

If additional sequences are needed, use the Add Occurrence button (F6) to add an additional record.

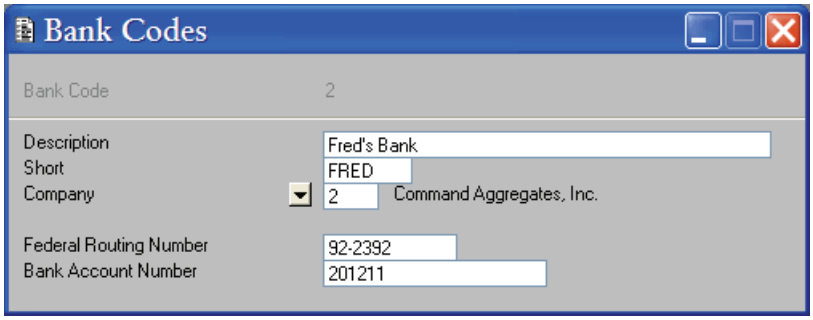
Bank Codes

The Bank Codes editor lets you define codes that represent the various banks used by your organization. Banks are assigned to Payment Transaction Batches, indicating the financial institution to which deposits are made. Bank Codes also define the G/L Booking Code for the deposit.

To set up bank codes:

1. Open the Bank Codes screen {Files > General Information > Bank Codes}.

Bank Codes (EDTBKCD)



2. Enter a **Bank Code** to identify the bank and account.
3. Enter a **Description** for the bank.
4. Enter a **Short** description.

5. If a specific company within your organization uses the bank, enter a **Company Code** in the **Company** field. Detail on the field to select from a list of valid companies.
6. Enter the bank's **Federal Routing Number**.
7. Enter the **Bank Account Number**.
8. **Accept** the screen.

Contact Types/Contacts

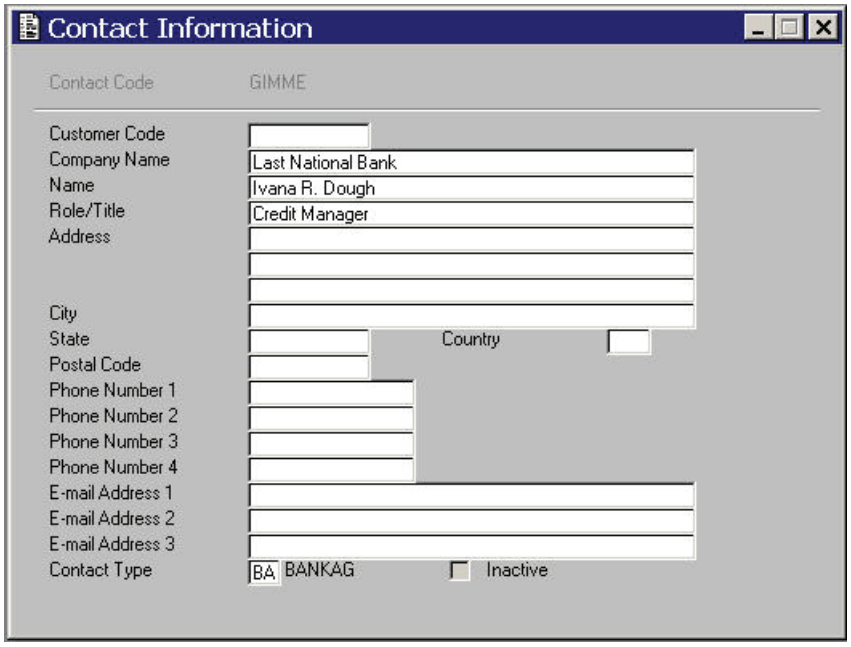
The Cash Management system requires that plants be assigned a Bank Agent–the person at the plant who deals with the bank. The Bank Agent is first entered in the Contact table. The contact is then assigned to a plant in the Plant editor.

Command Alkon recommends creating a new Contact Type for such contacts {Files > General Information > Contacts > Contact Types}:

Contact Type editor (EDTCTTY)

Create a new Contact Type for Bank Agents (the screen shot is just a sample), then create new Contacts for bank agents {Files > General Information > Contacts > Contacts}:

Contact Editor (EDTCTCT)



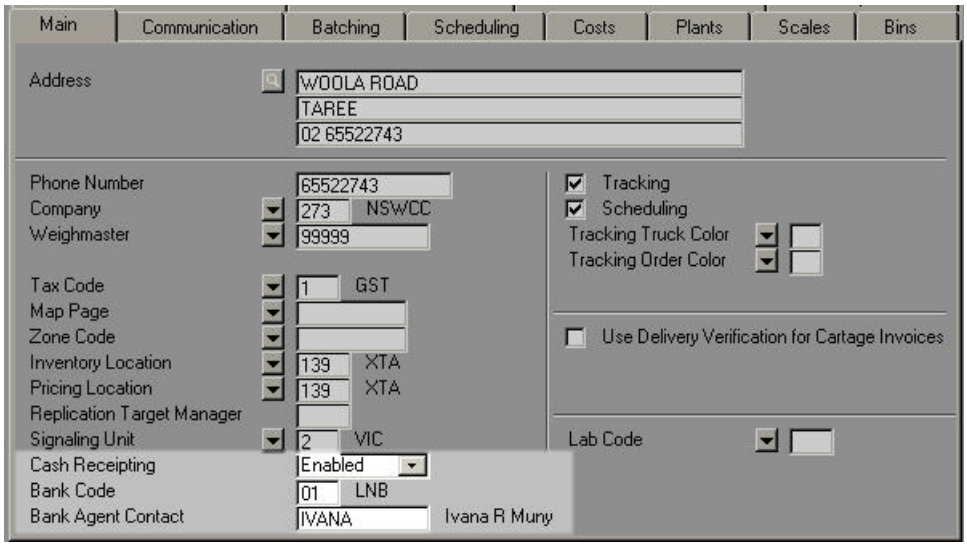
Plants

Three tabs in the Plant file must be updated:

- Main Tab
- Communication Tab
- Next Numbers

Main Tab

Three fields on the Plants-main tab must be set:



- **Cash Receipting** must be set to **`Enabled`**. When this field is set, two additional fields display below.
- **Bank Code** – Enter the bank code for the bank to which this plant will make deposits. You may detail on the field to select from a list.
- **Bank Agent Contact** – Enter the Bank Agent Contact code for your company's primary banking contact at the selected plant.

Communication Tab

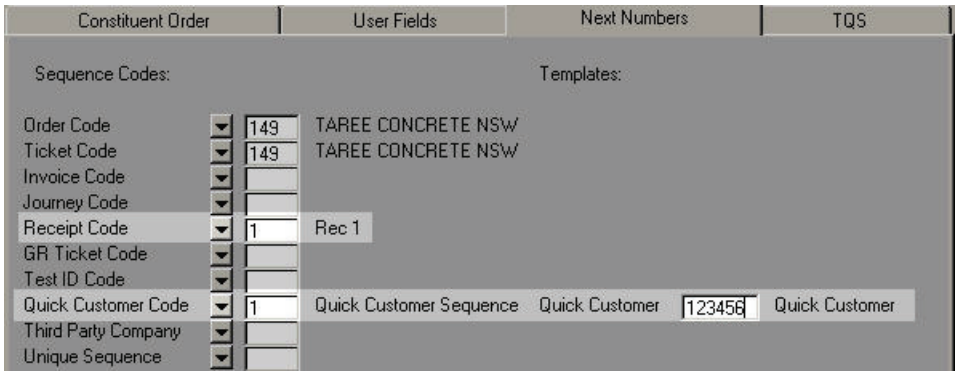
There is a new option to configure a receipt printer. Once the **Allow Receipt Printing** box is enabled, a Setup button will display.

The receipt printer is configured just like any other printer. Please refer to the Setting up the System manual for details.

Next Numbers Tab

Two sequences need to be set here:

Plants-Next Numbers tab (EDTPLNTZ)



- Enter the **Receipt Code** sequence to be used by the plant. Detail on the field to select from a list.
- Enter the **Quick Customer Code** sequence to be used by the plant. Detail on the field to select from a list. (If you do not use Quick Customer Creation, this setting is not needed).
- Enter the **Quick Customer** code of the customer record to be used as a template for this plant's quick customers. (If you do not use Quick Customer Creation, this setting is not needed)

Note: Make sure that the specified customer template is configured correctly. For example, if the default customer has the wrong credit code assigned, you will not be able to create a new COD order for the customer.

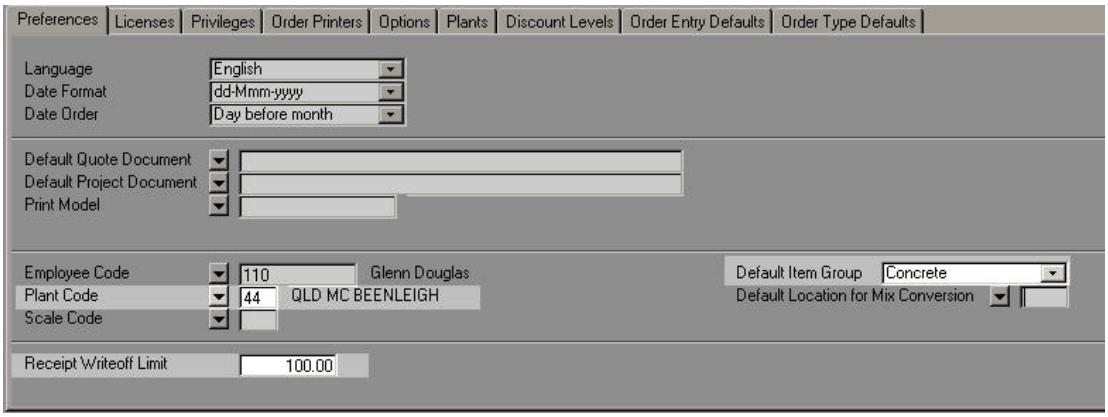
Users

User records are configured on two tabs:

- Preferences
- Order Type Defaults

User Preferences

User-Preferences tab (EDTUSNM1)

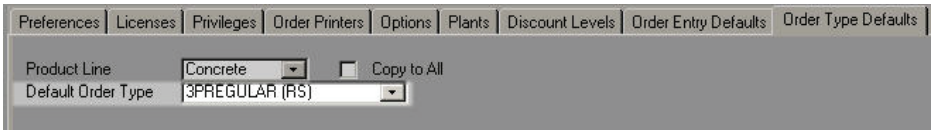


- **Plant Code** – The user must be assigned to a plant that is configured for cash management.
- **Receipt Writeoff Limit** – This field relates to receipt allocation. Sometimes, the receipt amount does not match the ticket amount. When this happens, the user has the option to write off the difference. To do that, the user entered a special reason code. Once the reason code is entered, the system validates the difference against the Receipt Writeoff Limit. If the difference is over the limit, the system will not accept the writeoff.

Order Type Defaults

Only one field needs to be changed here.

User-Preferences-Order Type Defaults tab (EDTUSMNO)



- **Default Order Type** – This field should be set to a Regular Sale (RS) Order Type.

Cash Management–Order Entry

The cash management functions in COMMANDseries are designed to let you accept monies received from customers and assign them to specific tickets without having to use COMMANDreceivables.

Cash management routines may slightly affect how routine tasks are performed.

Entering a COD Order

There are two variables involved here:

- For new customers, use the Quick Customer Entry form to create the new customer record.

- If a customer makes full or partial payment at the time of order entry, you will have to enter the payment and generate a receipt. When a receipt is generated during order entry, it is automatically allocated to the ticket.

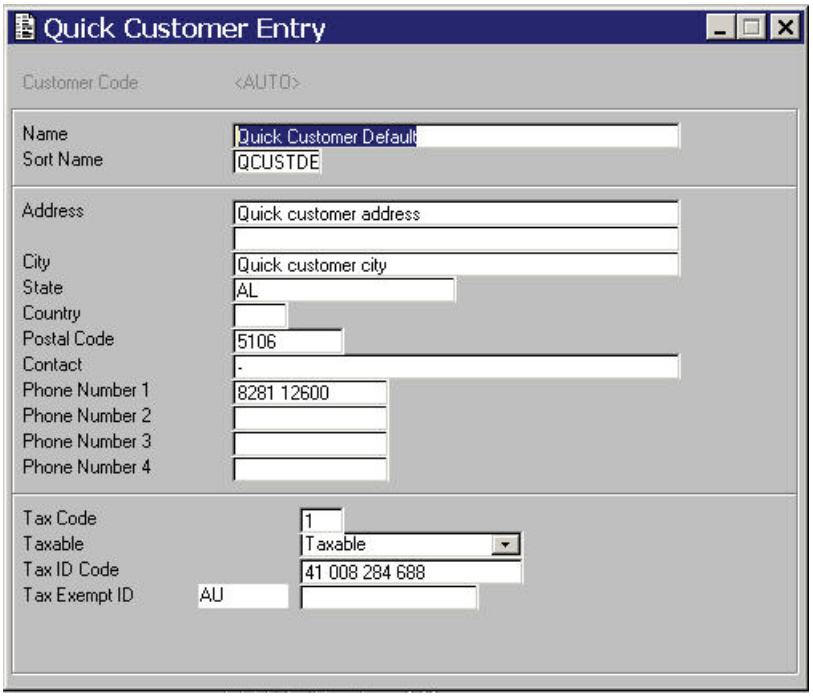
Quick Customer Entry

If the customer has already bought concrete, the customer record should already be in the system. Do a standard customer search from the order screen. If you cannot locate the customer, create a new record.

To use the Quick Customer Entry screen:

1. Make sure that the **Customer Code** field is clear, then <Tab> out of the field. The **Quick Customer Entry** screen will display:

Quick Customer Entry (EDTQCUS)



2. Enter information for the new customer. The initial values for these fields, as well as the values for fields not available on this screen, come from the default customer template as specified on the Plants-Next Numbers tab.
3. When you have entered the customer information, accept the screen. The system will save the new customer record, using a numeric customer code from the plant's assigned sequence. You will be returned to the main Order Entry screen, where the new customer will automatically be entered.
4. From here, continue with standard order entry.

Payment Entry

There are two situations in which you may need to enter a payment:

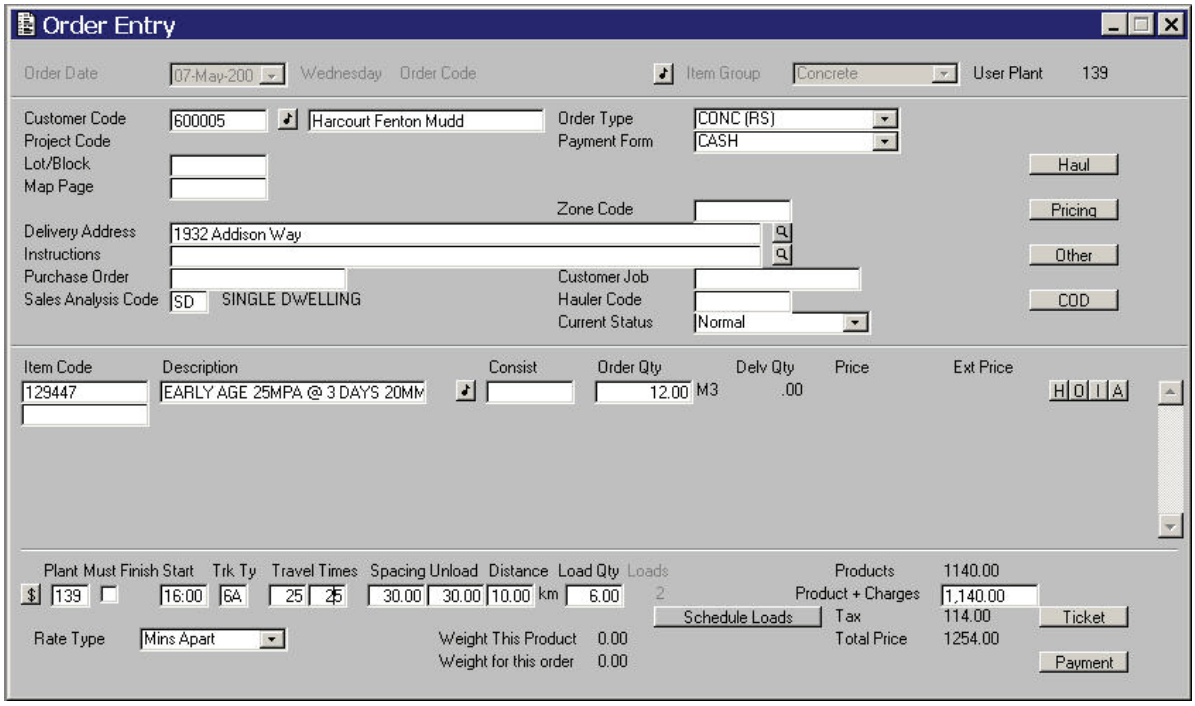
- A customer is ordering COD, and wants to pay at the time of order entry or ticketing.

- A customer wants to pay prior to ordering material (pre-payment).

COD Orders

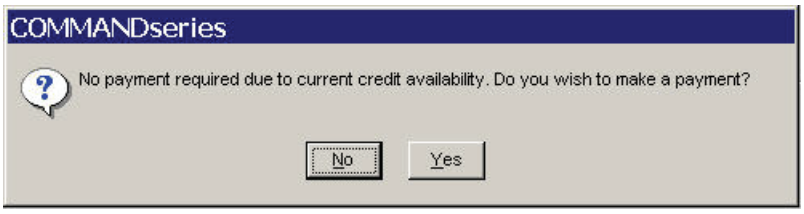
When a COD order is ready to be saved, the order total displays on the screen.

Concrete Order Entry-COD (EDTCORD)



When you accept a COD order, the system will prompt you regarding payment:

payment prompt

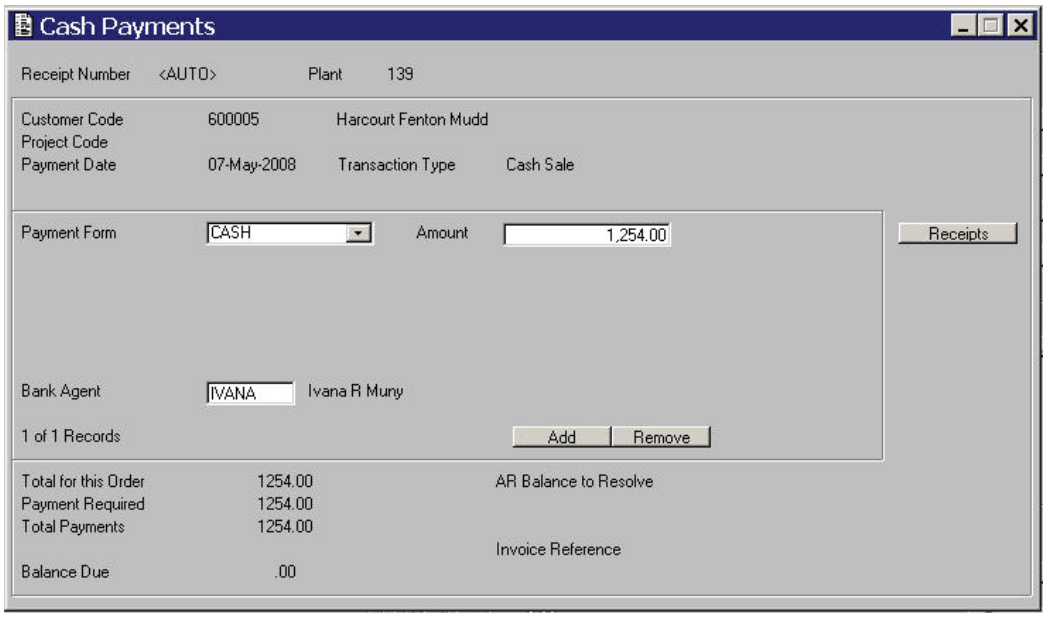


- If you select No, the order will be saved. You will process the payment/receipt at a later time.
- If you select Yes, you will initiate the Cash Payment Routine to enter a payment and automatically allocate it to this order's tickets.

To enter a cash payment from order entry:

1. Open the **Cash Payment** screen, either by responding yes to the above prompt or by pressing the **Payment** button on the Order Entry screen.

Cash Payments screen (EDTPMTS)

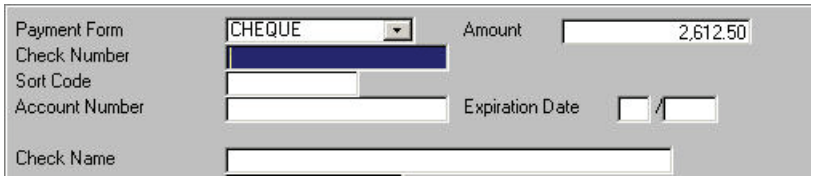


2. <Tab> through the Receipt Number field. The value will be populated upon acceptance of the form.
3. **Customer Code**, **Project Code**, **Payment Date**, and **Transaction Type** will all default from the order.
4. Select a **Payment Form** from the drop-down list. The available options will depend on system configuration and customer credit. Enter the information for the selected payment form.

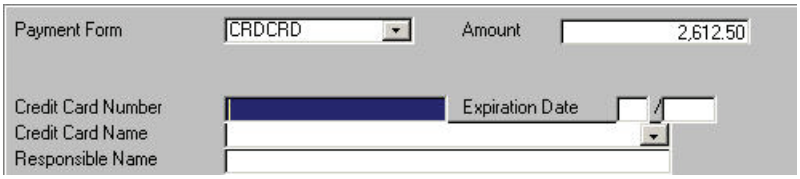
Note: You can update the customer's name and address on the Cash Payments form when a cash-and-carry customer's **Payment Form** is changed to a non-cash method. When anything other than cash is selected, the Customer Information Confirmation screen will pop up, letting you change the customer's name and street address. These two fields, along with the City field, are mandatory. Once information has been changed and saved here, it will be relfected in Order Entry.

Cash

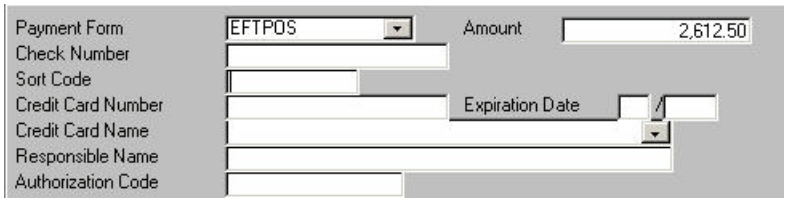
Check



Credit Card



EFTPOS



Direct

5. The plant's assigned **Bank Agent** will default.
6. If the customer has multiple forms of payment, use the **Add** button to create a new payment record. The area in the lower left will maintain a running total of all entered payments.
7. Press the **Receipt** button. The system will print a receipt, providing confirmation on the COMMANDseries message line:

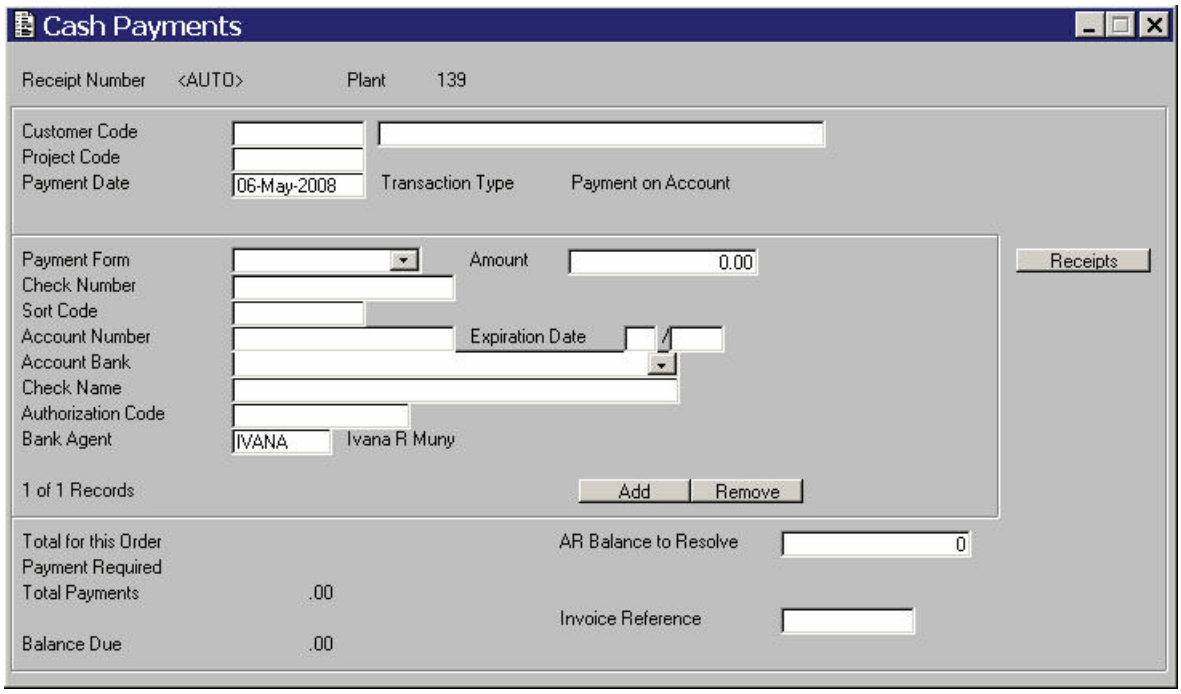
success!

Open Payments

Open Payments are payments that are not entered during order entry or ticketing, and thus are not allocated to specific tickets. These payments are often entered prior to order entry, but can be entered and allocated after the fact as well.

To enter a an open payment:

1. Open the **Cash Payments** screen {Dispatch > Payment Options > Cash Payments}
2. <Tab> through the **Receipt Number** field.



3. Enter the **Customer Code** and, if necessary, the **Project Code**.

   If this is a new customer, <Tab> out of the blank Customer Code field to call the Quick Customer Entry screen.

4. Enter payment information as described above.

   If a single payment is made with multiple Payment Forms (cash and check, for example), enter the payment information for the first payment form, then press the Add button to display a new Payment Form. Enter that information, and proceed.

   When a single payment is made with multiple Payment Forms, it is treated as a single payment for allocation purposes, but when the Reconciliation Report is run, the individual payment forms will be used to break out the cash properly.

5. Accept the screen or press the **Receipt** button to process the payment.

Receipt Allocation

During the course of the day, orders are taken and tickets are created. Cash Payments are made for the variety of cash customers. In the perfect world, all Cash Payments for a single day would be allocated to the Cash Tickets for that day. In reality, some Cash Payments may be left unallocated for future day orders, and some tickets may not get an allocation, thus remaining 'uncollected' at the end of the day.

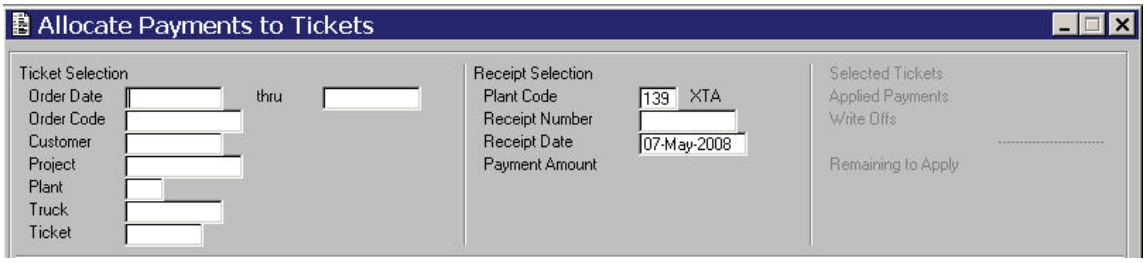
Cash Payments made at the time of Order Entry, for Customers where the Credit Code field “Verify Credit Limit” is false, are immediately assigned to the Order and allocated to its Tickets. Other Cash Payments must be allocated to tickets manually. The Allocate Payments to Tickets entry form allows for this process to happen.

The Receipt Allocation function lets you take previously-entered payments and allocate them to a delivered ticket. In this example, we’ll apply the payment taken earlier against existing tickets.

To allocate receipts:

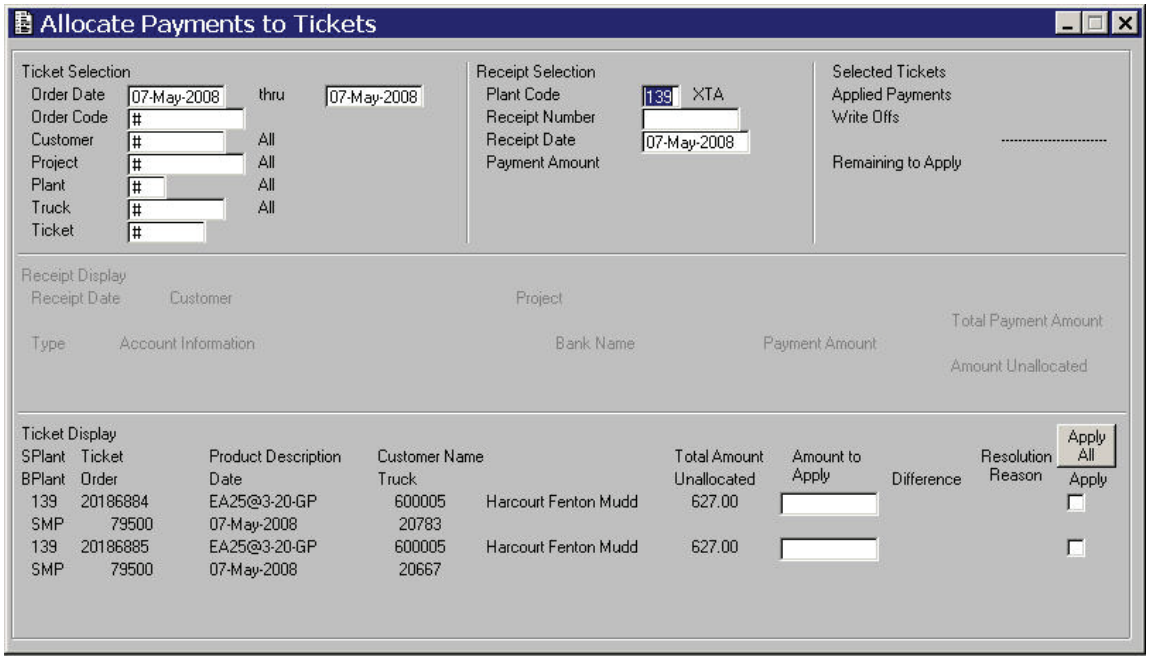
1. Open the **Receipt Allocation** screen. {Dispatch > Payment Options > Receipt Allocation}

Receipt Allocation screen (header) (EDTCODTK1)



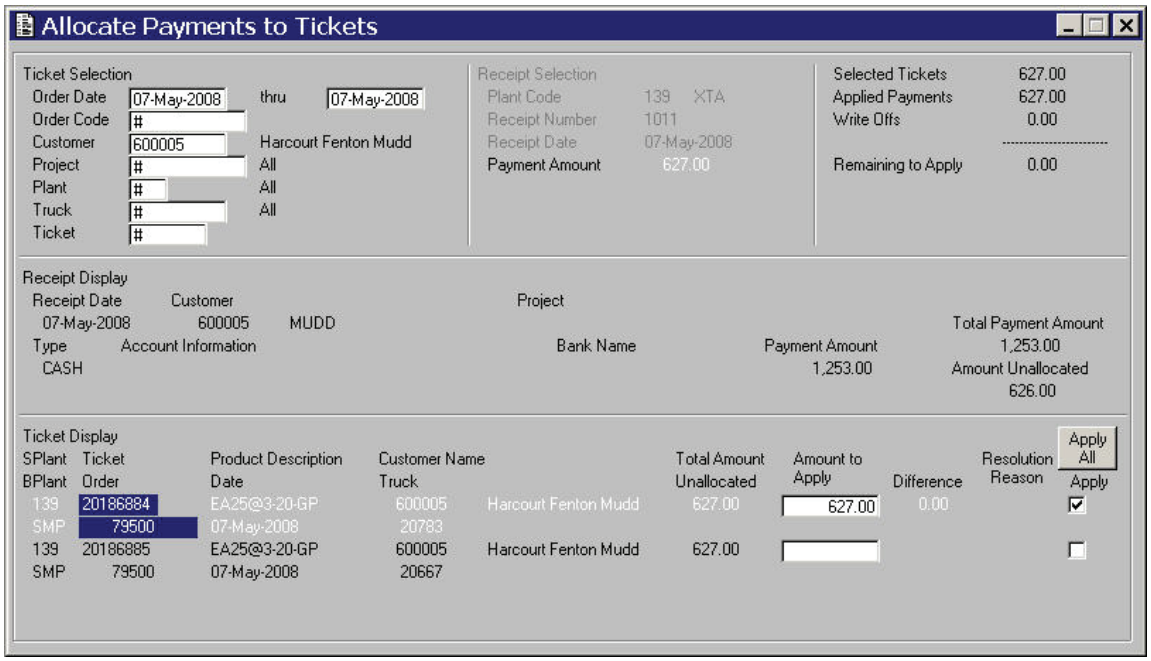
2. Enter values in the **Ticket Selection** area as needed. Once you <Tab> out of the **Ticket** field, the system will retrieve all tickets with an outstanding balance that match the entered criteria.

Retrieved tickets



3. Enter a specific Receipt (including date and plant code). The receipt is retrieved.
4. To apply money from the receipt to a ticket, select the **Apply** box next to that ticket.

note the changes

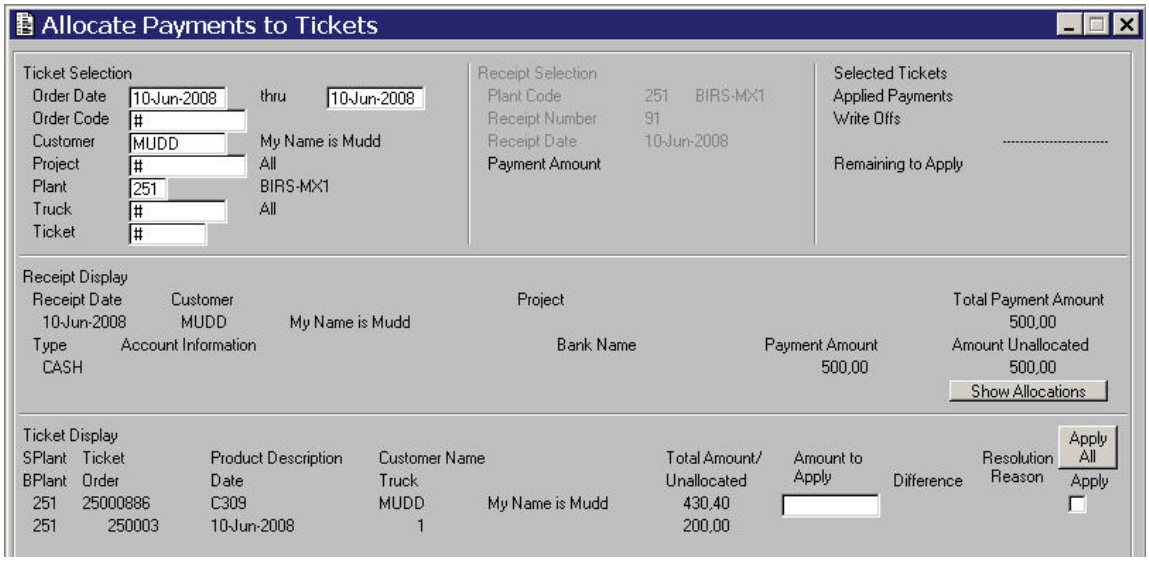

Allocate Payments to Tickets
Ticket Selection
Order Date 07-May-2008 thru 07-May-2008
Order Code #
Customer 600005 Harcourt Fenton Mudd
Project # All
Plant # All
Truck # All
Ticket #
Receipt Selection
Plant Code 139 XTA
Receipt Number 1011
Receipt Date 07-May-2008
Payment Amount 627.00
Selected Tickets 627.00
Applied Payments 627.00
Write Offs 0.00
Remaining to Apply 0.00
Receipt Display
Receipt Date Customer Project
07-May-2008 600005 MUDD
Type Account Information Bank Name Payment Amount Total Payment Amount
CASH 1,253.00 1,253.00
Amount Unallocated
626.00
Ticket Display
SPlant Ticket Product Description Customer Name Total Amount Amount to Difference Resolution Apply All
BPlant Order Date Truck Unallocated Apply Reason Apply
139 20186884 EA25@3-20-GP 600005 Harcourt Fenton Mudd 627.00 627.00 0.00
SMP 79500 07-May-2008 20783
139 20186885 EA25@3-20-GP 600005 Harcourt Fenton Mudd 627.00
SMP 79500 07-May-2008 20667

A single receipt can be applied to multiple orders and tickets for the same customer.

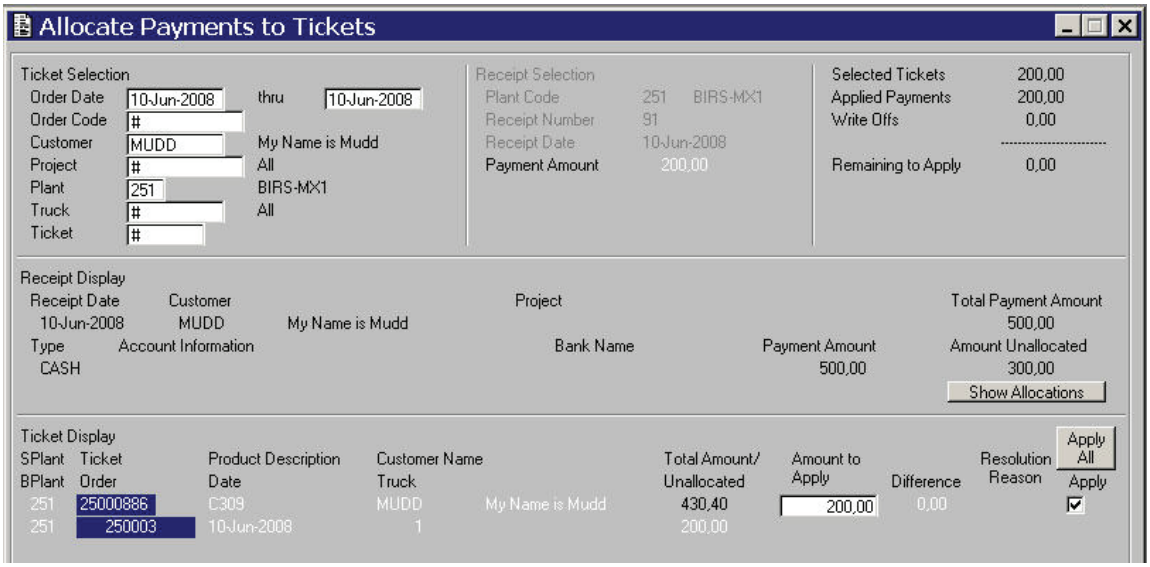
Scenario

A user makes a prepayment for 500.00. He later places a COD order totalling 430.00, and makes an immediate payment of 200.00.

1. Enter the order. Once the total has been calculated, press the **Payment** button.
2. On the payment screen, enter a payment for 200.00. When the payment is accepted, the system will print a receipt for the customer and apply the payment against the order.
3. At the end of the day, open the **Receipt Allocation** screen. Enter the receipt number and date. The system will retrieve the receipt as well as all tickets for the customer with outstanding balances.



4. Press the **Apply** box. The system will automatically allocate the balance of the ticket from the earlier payment.


Allocate Payments to Tickets
Ticket Selection
Order Date 10-Jun-2008 thru 10-Jun-2008
Order Code #
Customer MUDD My Name is Mudd
Project # All
Plant 251 BIRS-MX1
Truck # All
Ticket #
Receipt Selection
Plant Code 251 BIRS-MX1
Receipt Number 91
Receipt Date 10-Jun-2008
Payment Amount 200,00
Selected Tickets 200,00
Applied Payments 200,00
Write Offs 0,00
Remaining to Apply 0,00
Receipt Display
Receipt Date Customer Project Total Payment Amount
10-Jun-2008 MUDD My Name is Mudd 500,00
Type Account Information Bank Name Payment Amount Amount Unallocated
CASH 500,00 300,00
Show Allocations
Ticket Display
SPlant Ticket Product Description Customer Name Total Amount/ Amount to Difference Resolution Apply All
BPlant Order Date Truck Unallocated Apply Reason Apply
251 25000886 C309 MUDD My Name is Mudd 430,40 200,00 0,00
251 250003 10-Jun-2008 1 200,00

5. Accept the screen. You'll see a confirmation in the message bar that reads

   `Receipt x applied to ticket(s) y`

6. If you attempt to retrieve a ticket that has been completely paid off, you will receive the following message:

   In addition, the ticket will no longer appear on the Uncollected Tickets Report.

Emergency Cash Receipts

To enter emergency cash receipts:

• Create a Next Number sequence for emergency receipts. The emergency receipt sequence should not have a **`Next`** value.

• Assign each plant an emergency receipt sequence.

To enter an emergency receipt, open the Cash Payments screen and enter a receipt number that falls within the defined range, and then enter receipt information as usual.

Cash Management Tools

The Cash Management system in COMMANDseries provides multiple tools, both processing and reporting, to review a day's cash income.

- Cash Reconciliation
- Cancel Cash Reconciliation
- Reconciliation Report

- Uncollected Tickets Report
- Unallocated Receipts Report
- Document Formats

Cash Reconciliation

The **Cash Reconciliation** screen is used to balance the amount of cash, checks, and credit card slips a plant has in the system to the actual amounts in the cash drawer. The concept is similar to "cashing out" a cash register in a retail store.

The screen displays the various cash payments that have been collected since the last reconciliation, breaking them down by Payment Type. The dispatcher or plant manager totals up the cash on hand, checks, and credit slips and compares them to the screen totals. When the process is finished, the system makes a record of the balance results and the reconciliation date, using that as the baseline for the next reconciliation.

In addition, the screen displays unallocated receipts and uncollected tickets, giving you the opportunity to apply receipts to the tickets as needed.

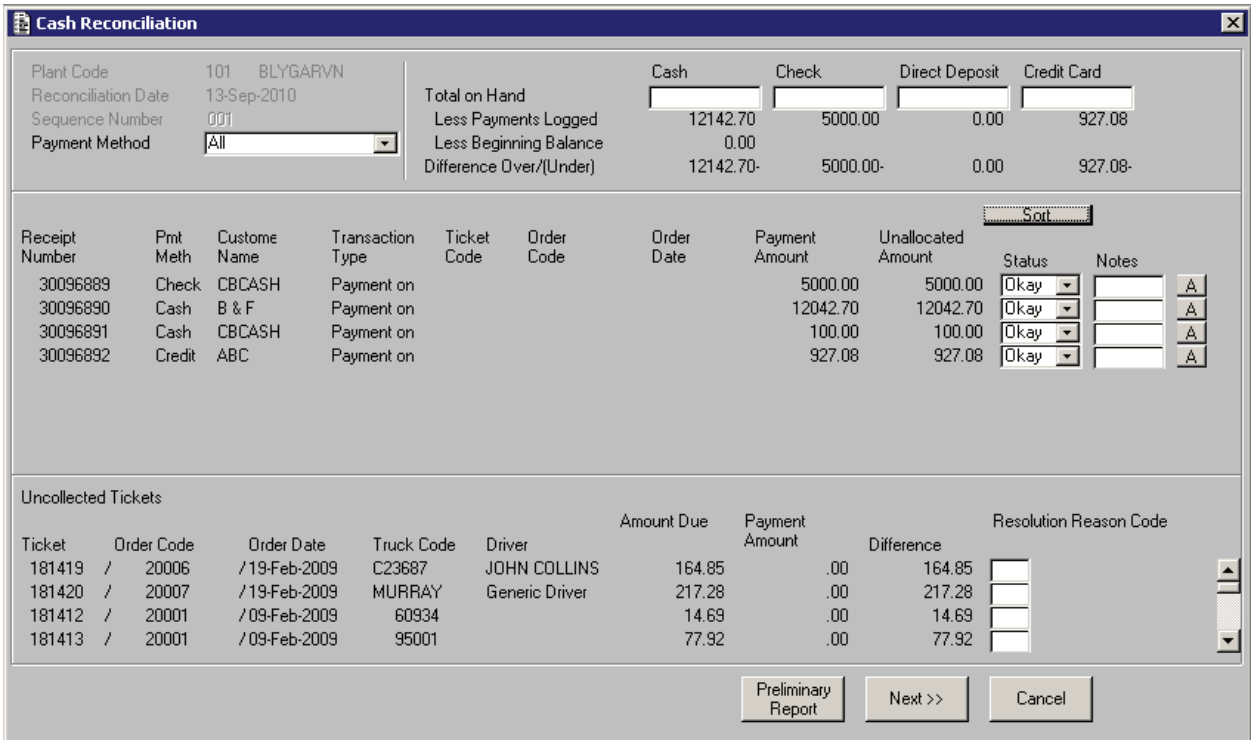
To reconcile cash:

1. Open the Cash Reconciliation screen {Dispatch >Payment Options > Cash Reconciliation}.

Cash Reconciliation screen header (EDTCREC)

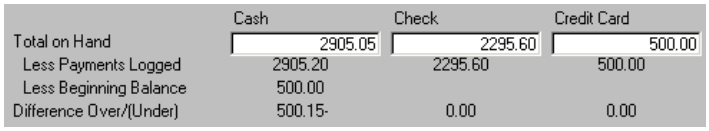
2. Your user **Plant Code** will default.
3. Enter the **Reconciliation Date**. The system will only reconcile payments and receipts with dates that fall between this date and the previous Reconciliation Date.
4. Select the **Payment Type**s that you wish to reconcile. Options are:
   - All
   - Cash and Check Only
   - Credit/Debit Card Only
5. Take note of the **Less Beginning Balance** amount. This represents petty cash, or cash on hand; cash that is to be kept at the plant and not deposited at the bank from the last reconciliation.
6. Once you tab out of the Payment Types field, the system will retrieve the uncollected tickets and all unallocated receipts.

Cash Reconciliation screen (EDTCREC)


Cash Reconciliation
Plant Code 101 BLYGARVN
Reconciliation Date 13-Sep-2010
Sequence Number 001
Payment Method All
Cash Check Direct Deposit Credit Card
Total on Hand
Less Payments Logged 12142.70 5000.00 0.00 927.08
Less Beginning Balance 0.00
Difference Over/(Under) 12142.70- 5000.00- 0.00 927.08-
Sort
Receipt Number Pmt Meth Custome Name Transaction Type Ticket Code Order Code Order Date Payment Amount Unallocated Amount Status Notes
30096889 Check CBCASH Payment on 5000.00 5000.00 Okay A
30096890 Cash B & F Payment on 12042.70 12042.70 Okay A
30096891 Cash CBCASH Payment on 100.00 100.00 Okay A
30096892 Credit ABC Payment on 927.08 927.08 Okay A
Uncollected Tickets
Ticket Order Code Order Date Truck Code Driver Amount Due Payment Amount Difference Resolution Reason Code
181419 / 20006 /19-Feb-2009 C23687 JOHN COLLINS 164.85 .00 164.85
181420 / 20007 /19-Feb-2009 MURRAY Generic Driver 217.28 .00 217.28
181412 / 20001 /09-Feb-2009 60934 14.69 .00 14.69
181413 / 20001 /09-Feb-2009 95001 77.92 .00 77.92
Preliminary Report
Next >>
Cancel

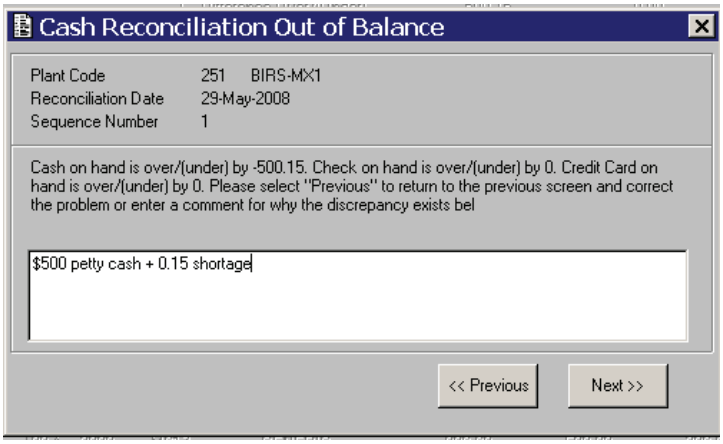
All receipts within the date range are displayed, showing both the payment and unallocated amount. For Direct Deposit and Preliminary Reconciliation Report information, please see the corresponding sections in this document.

7. The **Status** of all the receipts defaults to **Okay**. If for some reason you do not wish to include a given receipt in this reconciliation sequence, change the status to **Hold**. Receipts on hold are not included in the **Payments Logged** totals at the top of the screen.
8. To allocate a receipt, identify both a receipt with unallocated funds, and then press the **A** button for that receipt. The **Allocate Receipt** screen will be loaded, displaying the receipt and all the outstanding tickets that qualify. Allocate as usual, accept the screen, and close the screen to return to the Cash Reconciliation screen. When you do, the screen will automatically recalculate based on the newly entered allocations.
9. Total your cash, checks, and credit card slips, and enter those figures. The totals section will update accordingly.


Cash Check Credit Card
Total on Hand 2905.05 2295.60 500.00
Less Payments Logged 2905.20 2295.60 500.00
Less Beginning Balance 500.00
Difference Over/(Under) 500.15- 0.00 0.00

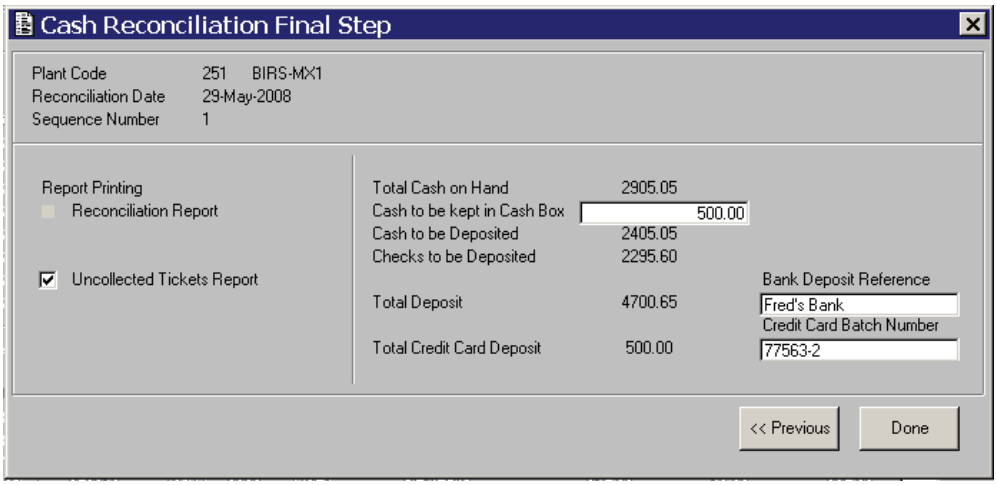
The difference for cash reflects the initial $500 in petty cash plus an additional 0.15 shortage.

10. Press **Next**. The **Cash Reconciliation Out of Balance** screen will display:


Cash Reconciliation Out of Balance
Plant Code 251 BIRS-MX1
Reconciliation Date 29-May-2008
Sequence Number 1
Cash on hand is over/(under) by -500.15. Check on hand is over/(under) by 0. Credit Card on hand is over/(under) by 0. Please select "Previous" to return to the previous screen and correct the problem or enter a comment for why the discrepancy exists bel
$500 petty cash + 0.15 shortage
<< Previous
Next >>

You are required to enter a note explaining the difference.

11. Press **Next**. The **Final Step** screen displays.



12. You may select two reports to run:
    - Reconciliation Report
    - Uncollected Tickets Report
13. The screen will total all the available cash. Specify the amount of **Cash to be kept in Cash Box**. This amount will display as the **Beginning Balance** for the next reconciliation.
14. Enter the **Bank Deposit Reference**. The information entered will be determined by your company.
15. Enter the **Credit Card Batch Number**, received from your credit card processor.
16. Press **Done**. If you have selected any reports, you will be prompted for a print model.
17. Select your print model to finish the process.

Cancel Cash Reconciliation

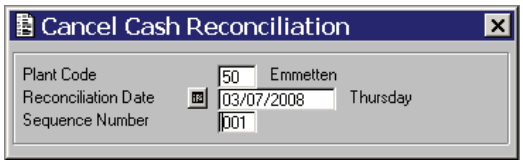
The Cancel Cash Reconciliation function lets you cancel cash reconciliation transactions.

The routine validates the Data Out Date field for each payment line being canceled; you will not be able to cancel a reconciliation that has already been interfaced to a third-party system.

To cancel a reconciliation entry:

1. Open the **Cancel Cash Reconciliation** form. {Dispatch > Payment Options > Cancel Cash Reconciliation}

Cancel Cash Reconciliation form (DBACNCR)



2. The **Plant Code** assigned to the current user will default; if necessary, you can enter a different plant or detail on the field to select from a list. You must have permission to a plant in order to select it.
3. Enter a **Reconciliation Date**.
4. Enter a **Sequence Number** or detail on the field to select from a list.
5. Accept the screen to cancel the reconciliation.

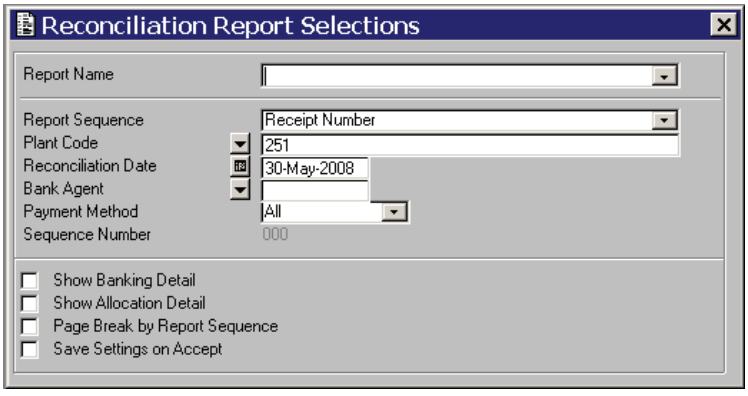
Reconciliation Report

This report provides details of a given reconciliation sequence.

To run a reconciliation report:

1. Open the **Reconciliation Report Selections** screen {Dispatch > Payment Options > Payment Reports > Reconciliation report}.

Reconciliation Report Selections (SELCREC)



2. If you wish to create a saved report configuration, enter a **Report Name** and check the **Save Settings on Accept** box.
3. Select a **Report Sequence**. Options are:
   - **Receipt Number**
   - **Payment Method**

- **Bank Agent**

4. Your assigned plant (the plant you selected at login) will default in the **Plant Code** field. You may change this value to any other plant to which you have CS privileges.
5. Select a **Reconciliation Date**.
6. Select a **Bank Agent**, if necessary.
7. Select **Payment Method**(s).
8. The **Sequence Number** will default based on the available sequences for the entered date. If `000` appears, then there are no sequences for the selected date.
9. Accept the screen and select a Print Model.

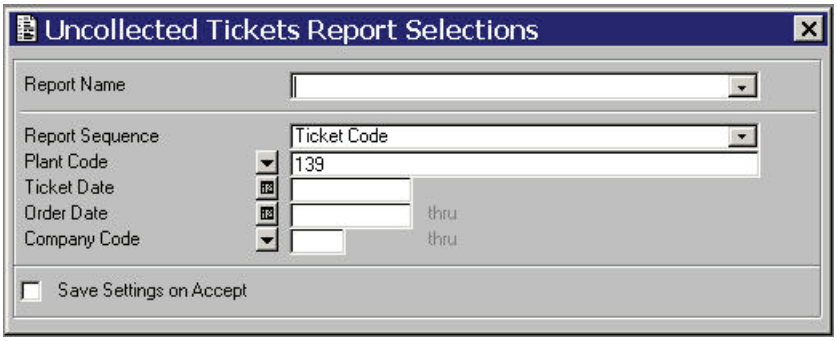
Uncollected Tickets Report

The this report shows all COD tickets that have not been completely paid.

To run an unallocated tickets report:

1. Open the **Uncollected Tickets Report Selections** screen {Dispatch > Payment Options > Payment Reports > Uncollected Tickets report}.

Uncollected Tickets Report Selections (SELUNTK)



2. If you want to save a report configuration, enter a **Report Name** and check the **Save Settings on Accept** field.
3. Select a **Report Sequence**. Currently, the only option in this field is **`Ticket Code`**.
4. Select a **Plant Code**, or enter a range of plants.
5. If necessary, enter **Ticket Date**, **Order Date**, and **Company Code** ranges.
6. Accept the screen to generate the report.

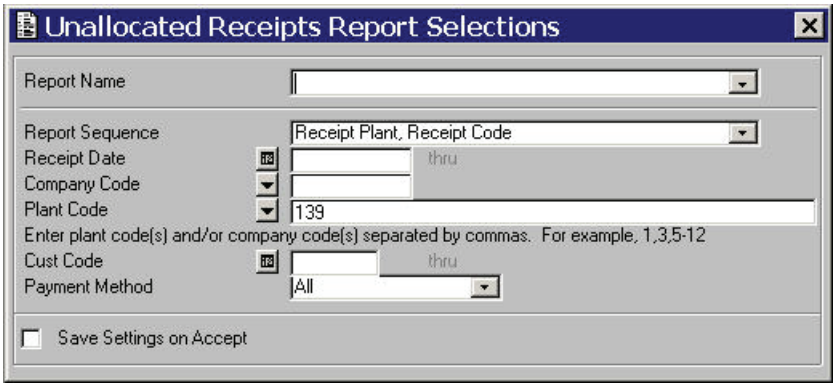
Unallocated Receipts Report

Just as the Unallocated Tickets report finds COD tickets that have not been paid, the Unallocated Receipts Report identifies receipts that have not been assigned to any ticket(s).

To run an unallocated receipts report:

1. Open the **Uncollected Receipts Report Selections** screen {Dispatch > Payment Options > Payment Reports > Uncollected Receipts report}.

Uncollected Tickets Report Selections (SELUNRC)



2. If you want to save a report configuration, enter a **Report Name** and check the **Save Settings on Accept** field.
3. Select a **Report Sequence**. Currently, the only option in this field is **`Ticket Code`**.
4. Enter a **Receipt Date** or date range.
5. Enter a **Company Code**, or detail on the field for a list of companies.
6. Select a **Plant Code**, or enter a range of plants.
7. Enter a **Customer Code** or code range.
8. Select the **Payment Method**(s) to be included on the report.
9. Accept the screen to generate the report.

Document Formats

Two new calculation document tags (**`ORORAM`** and **`DSPCAM`**) have been created for Order Print and Data In/Out. These new tags will be used to display the original order amount before any discounts (**`ORORAM`**), as well as the discount amount received (**`DSPCAM`**). These tags will only be used to calculate Cash orders.

Purging Quick Customers

While the ability to create Quick Customers prevents order takers from having to wait for a standard customer account to be created, it can result in a large number of quick customer records filling up the database. The Purge Customer routine allows you to filter customer by accounting category and credit code, and will purge records from the following tables:

- CUST – Customer
- CUSO – Customer overflow
- CUCO – Customer Credit
- CUSG – Customer Sundry Charge
- CUIG – Customer Item Groups
- CUIU – Customer Item Groups Unloading Charges
- CUHS – Customer History

Note: Any customer note linked to a customer being purged will have its status set to "Completed"; the new status will allow the note to be purged using the Purge Customer Notes routine.

Exceptions

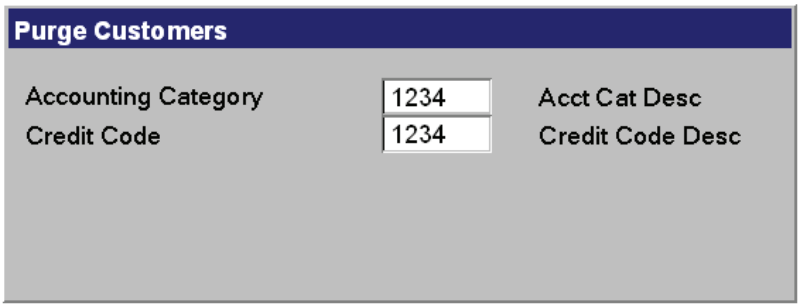
The following customer records will not be purged:

- Customers assigned as the configuration quick customer template or default quick customer
- Any customer assigned as the default quick customer template for a plant
- Any customer with active orders, standing orders, projects, quotes, or payments

To Purge Customers:

1. Open the Purge Customers form. {Manage > Application Management > Purge Customers}

Purge Customers form (DBACUST)



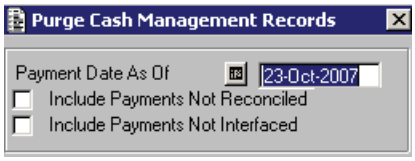
2. Enter an **Accounting Category** or detail on the field to select from a list. If the field is left blank, all accounting categories will be included.
3. Enter a Credit Code or detail on the field to select from a list. If the field is left blank, all credit codes will be included.
4. Accept the screen.

Purge Records

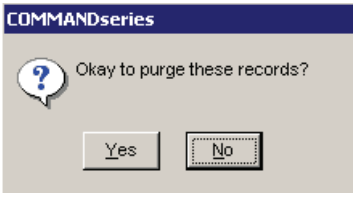
Over time, a large number of cash management records can accumulate within COMMANDseries. With this modification, you can purge cash management records in COMMANDseries, freeing up space in the database.

A new screen, Purge Cash Management Records {Manage > Application Management > Purge Cash Management Records}, has been created to allow for easy purging of cash management records. The only required field on this screen is the **Payment Date As Of** date field. You can chose to include payments that have not been reconciled or interfaced yet by selecting the associated check box.

Purge Cash Management Records (DBAPMTS)



Once you've entered a purge date and selected any necessary checkboxes, press F2. The below message will display:



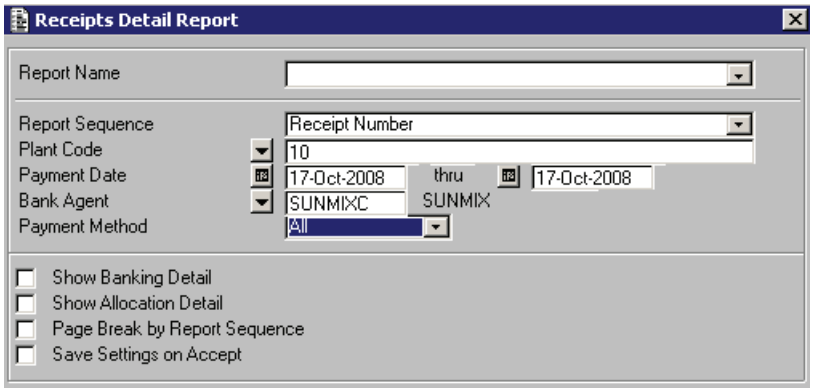
Select **Yes** to purge the records. All PMTS (Payment), PMTL (Payment Line Information), PMTA (Payment Allocation), and PLCR (Plant Reconciliation) records meeting the criteria selected on the Purge Cash Management Records screen will be deleted.

Note: If PMTA records are removed for at ticket, the ticket will be considered "Uncollected" on the Uncollected Ticket Report, Cash Reconciliation Report, and Receipt Allocation report.

Reports

A new report, Receipts Detail {Dispatch > Payment Options > Payment Reports > Receipts Detail Report}, has been created so that users will have a hardcopy of cash payment detail information for the records that are being purged. It is a good idea to run this report before you purge cash management records. Information can be entered on this screen the way you do for all other reports in COMMANDseries.

Receipts Detail Report (SELPMTS)



Note: Select **Show Banking Details** to display all information related to banking, such as account numbers, for each receipt. **Show Allocation Detail** will display all allocation information related to each receipt. When **Page Break By Sequence** is selected, the report will have a page break for each receipt. To save the report settings, select **Save Settings on Accept** before pressing F2.

Below is an example of a generated report that shows both banking details and allocation details:

```
Date 17-Oct-2008                                    Boral ACH - Prod                                    Page     3

Plant          Payment     Bank     Payment                                          Transaction      Payment  Reconciliation Deposit
 Code Receipt   Date       Agent    Method      Customer   Name                       Type             Amount   Date           Reference    Data Out
================================================================================================================================================
 10   10133     14-Oct-2008 HARGIE   Check       HDAVIS     HDAVIS                     Cash Sale        1500.00  14-Oct-2008

               Banking Detail:
                 Check Number          Sort Code     Account Number       Account Bank          Check Name          Authorization Code
                 52146                                                    Bank 1

               Allocation Detail:
                              Ticket Code   Order Code    Order Date   Amount

 10   10134     14-Oct-2008 HARGIE   Credit Card HRD001     HRD001                     Cash Sale        5000.00  14-Oct-2008

               Banking Detail:
                              Expiration Date   Account Number       Account Bank          Responsible Name    Authorization Code
                              10/2011           85213698745631       Wachovia Bank

               Allocation Detail:
                              Ticket Code   Order Code    Order Date   Amount
```

Direct Deposits

Cash Management has been updated to allow direct deposits. These direct deposits will be recognized as a cash form of payment but will be handled separately during the Cash Reconciliation process from cash, checks, and credit cards.

Configuration and Workflow

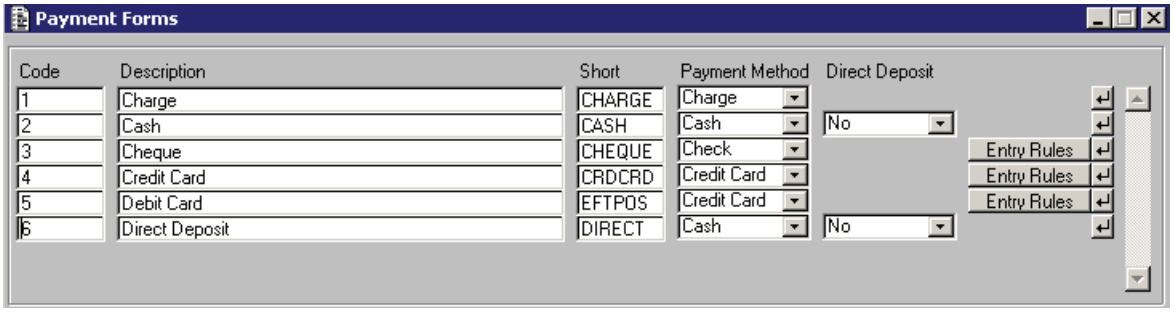
To accommodate the addition of direct deposits, new fields have been added to the Cash Reconciliation screen {Dispatch > Payment Options > Cash Reconciliation}. Before you can use direct deposit, you must set up a payment form for direct deposit.

Note: A new field, **DIRECT_DEPOSIT_CODE**, has been added to the PMTF (Payment Form) record to hold the new direct deposit information.

To set up a Direct Deposit payment form:

1. Go to the Payment Forms screen {Files > Customer & Project Information > Payment Forms}.

Payment Forms (EDTPMTF)



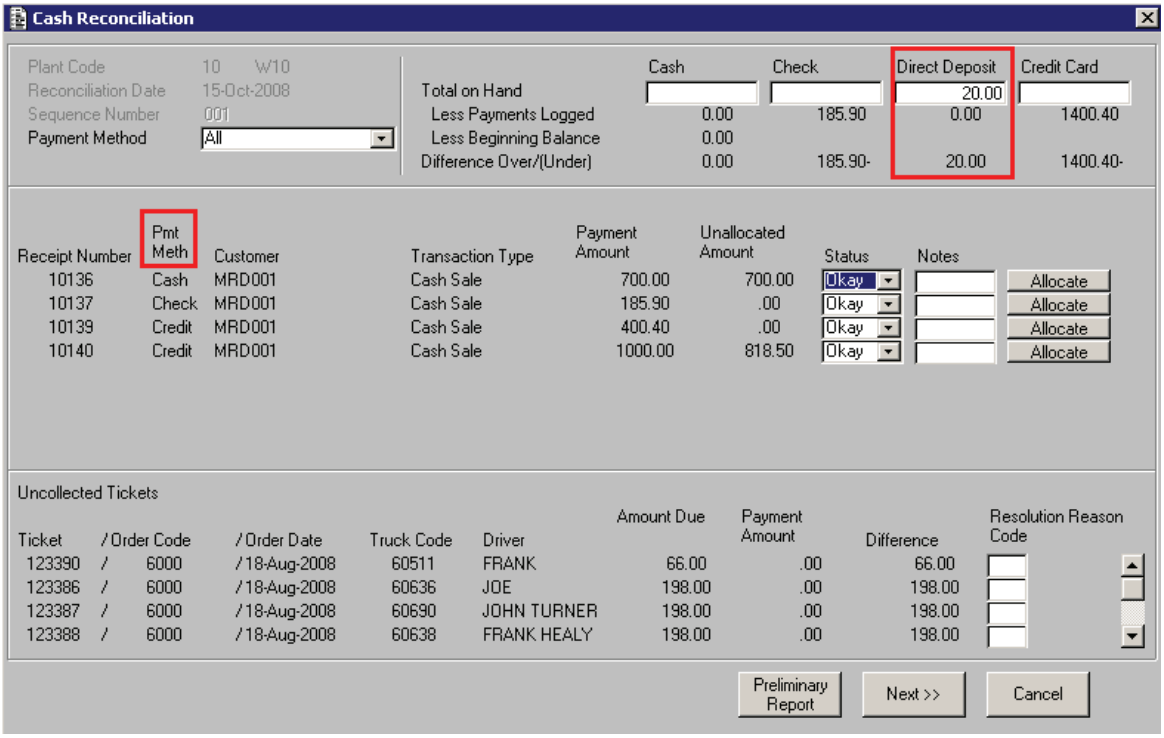
2. Press F6 to add a new payment form.
3. Enter the appropriate **Code**, **Description**, and **Short** description for the direct deposit.

4. Select **Cash** for the **Payment Method**. When Cash is selected, the new **Direct Deposit** field will appear. Cash is the only option you can select for direct deposit to work within COMMANDseries.
5. Select **Yes** for **Direct Deposit**.
6. **Accept** the form to save your changes.

Cash Reconciliation

Once you have set up the direct deposit payment form, you can begin applying direct deposits in Cash Management. The Cash Reconciliation form has been updated to reflect direct deposits:

Cash Reconciliation (DBACREC)

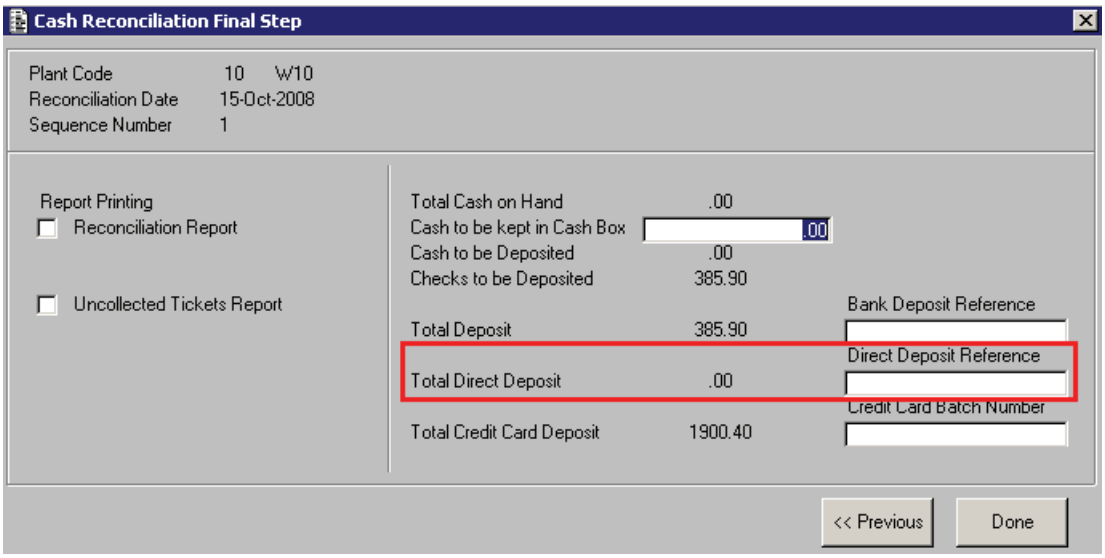


Note: The **Payment Types** column header has been renamed **Payment Meth** (Payment Methods). Direct Deposits will display in this column as "DD."

Totals for entries on the Cash Payments screen {Dispatch > Payment Options > Cash Payments} that have a payment form of Direct Deposit will display in the Direct Deposit column at the top of the Cash Reconciliation screen. You can total your direct deposits here.

Once all information on the Cash Reconciliation screen has been balanced, press the **Next** button to go to the Cash Reconciliation Final Step screen. You will notice a new section dedicated to direct deposits:

Cash Reconciliation Final Step (DBACREC1)



Direct deposit totals will be included in the new direct deposit section of the screen. You can enter your company's direct deposit reference number in the **Direct Deposit Reference** field. Both the direct deposit totals and the direct deposit reference number will be posted to new fields on the PLCR (Plant Reconciliation) record: **DD_DEPOSIT_AMT** and **DD_OVER_UNDER_AMT**.

Reporting

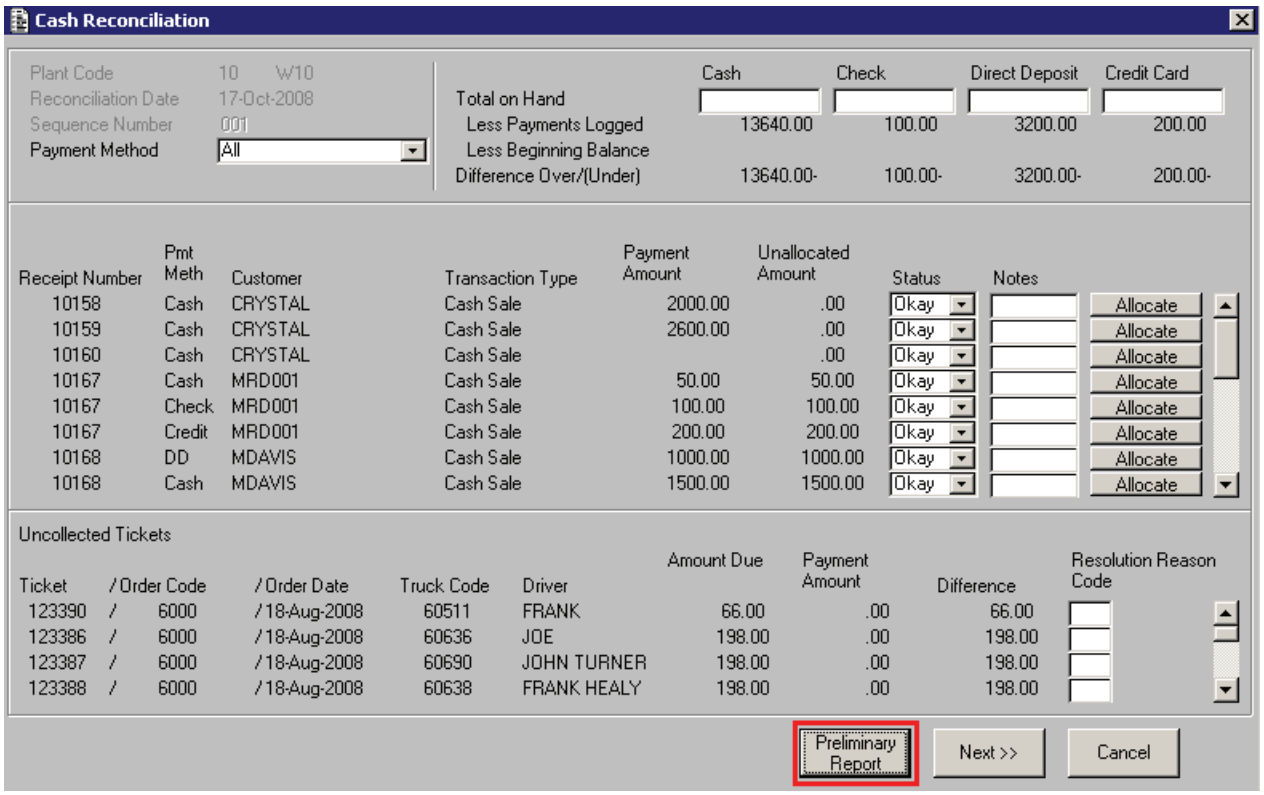
The Reconciliation report {Dispatch > Payment Options > Payment Reports > Reconciliation Report} has been modified to include direct deposit totals at the bottom of the report.

Preliminary Reconciliation Report

The Preliminary Reconciliation report (Dispatch > Payment Options > Cash Reconciliation) pulls information from the payment records currently loaded in the Cash Reconciliation screen, providing a convenient means of reviewing the allocations before saving them

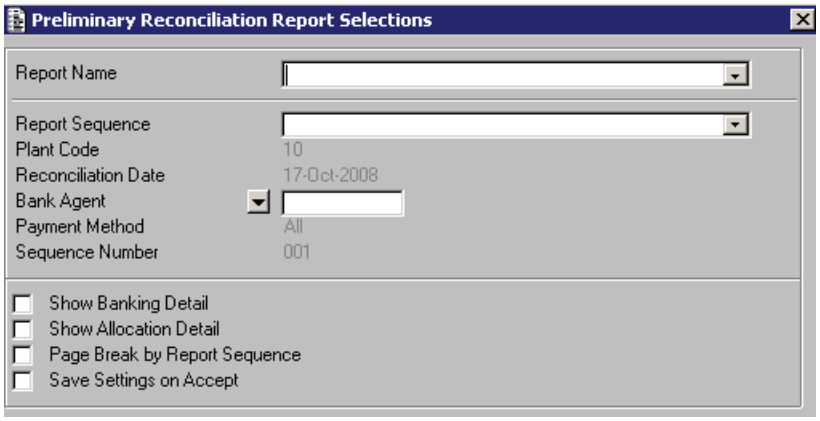
Click the **Preliminary Report** button on the Cash Reconciliation screen to bring up the Preliminary Reconciliation Report selection screen.

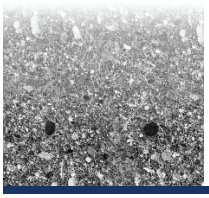
Cash Reconciliation Screen (DBACREC)


Cash Reconciliation
Plant Code 10 W10
Reconciliation Date 17-Oct-2008
Sequence Number 001
Payment Method All
Cash Check Direct Deposit Credit Card
Total on Hand
Less Payments Logged 13640.00 100.00 3200.00 200.00
Less Beginning Balance
Difference Over/(Under) 13640.00- 100.00- 3200.00- 200.00-
Receipt Number Pmt Meth Customer Transaction Type Payment Amount Unallocated Amount Status Notes
10158 Cash CRYSTAL Cash Sale 2000.00 .00 Okay Allocate
10159 Cash CRYSTAL Cash Sale 2600.00 .00 Okay Allocate
10160 Cash CRYSTAL Cash Sale .00 Okay Allocate
10167 Cash MRD001 Cash Sale 50.00 50.00 Okay Allocate
10167 Check MRD001 Cash Sale 100.00 100.00 Okay Allocate
10167 Credit MRD001 Cash Sale 200.00 200.00 Okay Allocate
10168 DD MDAVIS Cash Sale 1000.00 1000.00 Okay Allocate
10168 Cash MDAVIS Cash Sale 1500.00 1500.00 Okay Allocate
Uncollected Tickets
Ticket / Order Code / Order Date Truck Code Driver Amount Due Payment Amount Difference Resolution Reason Code
123390 / 6000 / 18-Aug-2008 60511 FRANK 66.00 .00 66.00
123386 / 6000 / 18-Aug-2008 60636 JOE 198.00 .00 198.00
123387 / 6000 / 18-Aug-2008 60690 JOHN TURNER 198.00 .00 198.00
123388 / 6000 / 18-Aug-2008 60638 FRANK HEALY 198.00 .00 198.00
Preliminary Report
Next >>
Cancel

The **Preliminary Reconciliation Report Selections** screen is identical to the existing Reconciliation Report selection screen. Enter any relevant information and press **F2** to generate the report.

Preliminary Reconciliation Report Selections (SELPCREC)





Customer Notes

As companies grow, it can become harder to communicate between different divisions. The Customer Notes function provides a flexible and efficient means of passing additional information to others areas of the company.

Topics in this section:

Types of Notes
Entering Notes
Managing Customer Notes
Notes Listing
Dispatch Memos in Order Entry
Deleting, Managing & Purging Completed Notes

Types of Notes

Notes are classified based on the type of record with which they are associated. A single note can be associated with multiple record types. Below are examples of the types of notes users can create:

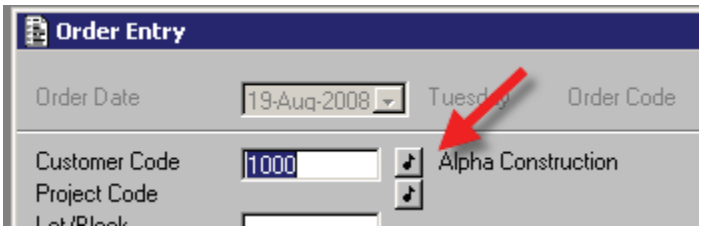
- **Customer** – A note reminding order takers that this customer generally under orders, and to schedule a cleanup load for all orders, or a note for invoice clerks reminding them that this customer should never be charged a minimum load charge.
- **Project** – A note that the site entry location varies depending on the time of day, or perhaps a reminder that this project has special priority. That information can then be passed on to the drivers when each load is ticketed.
- **Order** – A note to inform accounting that the dispatcher has discounted the order due to delivery issues. Such notes can be included in the Preliminary Invoice Register. Order-level notes can only be entered against existing orders. To enter a note during intial order entry, use dispatch memos.
- **Product** – Notes concerning placement or finishing instructions (most often set within a project record)
- **AR Transaction** – Reminders to follow up with a customer concerning a late or promised payment
- **Dispatch Memo** – Dispatch Memos are a specialized variant of customer notes that can be entered during order entry (standard order-level notes can only be entered against an existing order. Dispatch Memos will be discussed at the end of this section.

Entering Notes

Customer Notes can be entered and accessed in a number of ways. The most common method is from one of the following primary work screens:

Notes can be entered or accessed by…	Using the…
Salesmen	Quote screens
Order Takers	Order Entry screens
Dispatchers/Batchers	Ticketing screens
Invoicing clerks	Edit Order and Tickets screen
A/R clerks	Transaction Detail screens
Account Managers	Customer/Project edit screens

Notes Button in Order Entry



Since the above screen represents a new (unsaved) order, it is not possible to enter an order-level note. Order-level Notes should be entered as Dispatch Memos.

When the **Notes** button is dark, as shown above, there are no notes associated with the customer (or project, or order); if the button is lit there is at least one note present in the system. Selecting a lit Notes button displays a list of relevant notes. Pressing an unlit button takes you directly to the Customer Notes editing screen.

Notes can be configured to automatically display in certain situations. For example, if you enter a note that a customer is not to be charged any minimum load charges, you can configure the note so that whenever a dispatcher attempts to ticket a load for that customer, the note automatically displays. Similarly, when an invoicing clerk brings up that order for review during ticket prep, the note automatically displays as well.

In addition to the on-screen display, the Notes Listing function can provide you with a printed copy of Customer Notes, filtered according to your selections.

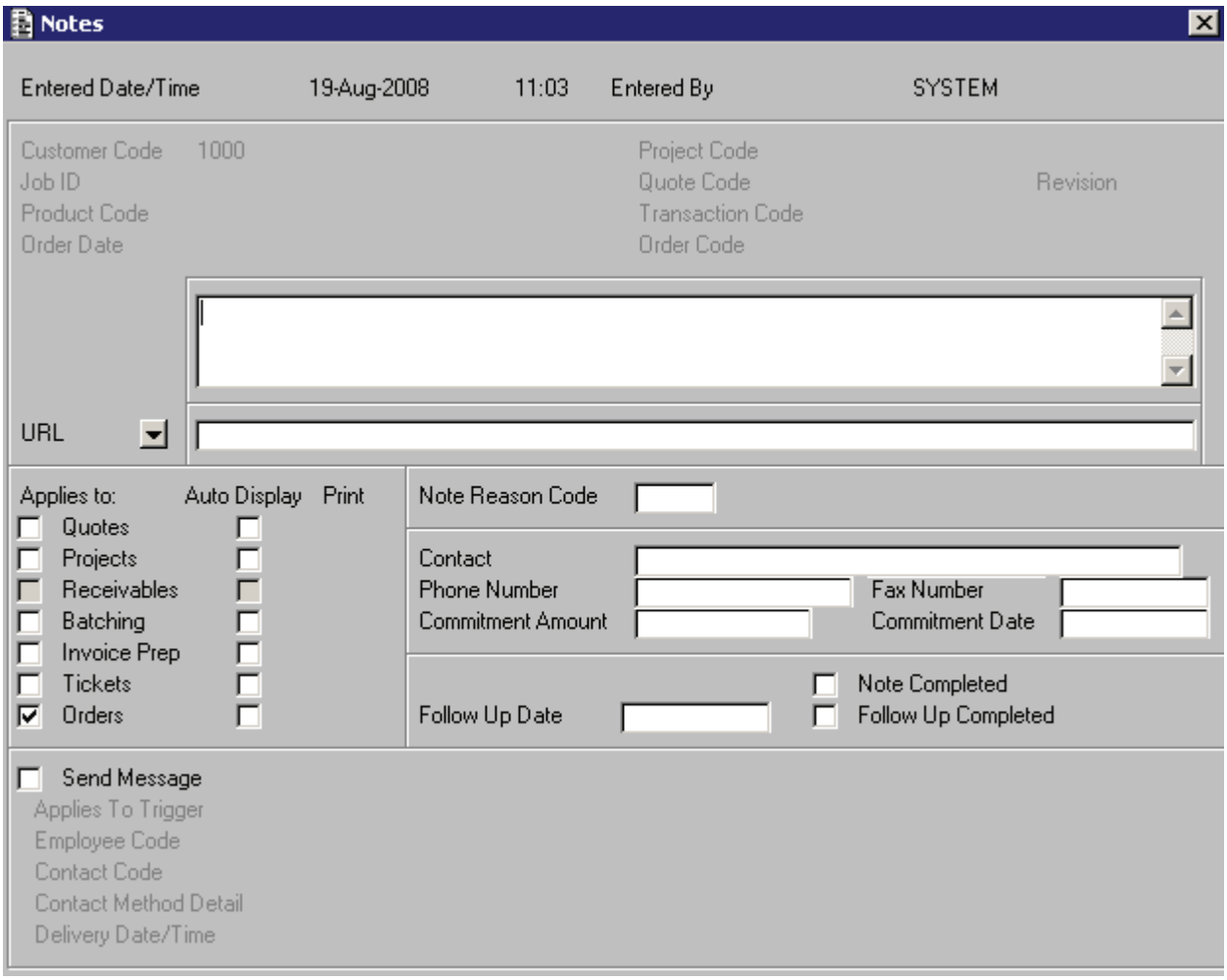
Even though notes can be entered from a number of different modules, the basic procedure is the same. All fields on the form(s) will be described, even those that do not pertain to an order-level note.

To enter an order-specific note:

1. Retrieve a current order.

2. Select the **Notes** button to the right of the Order Code. If there are no current notes for the current order, the Notes editor will display.

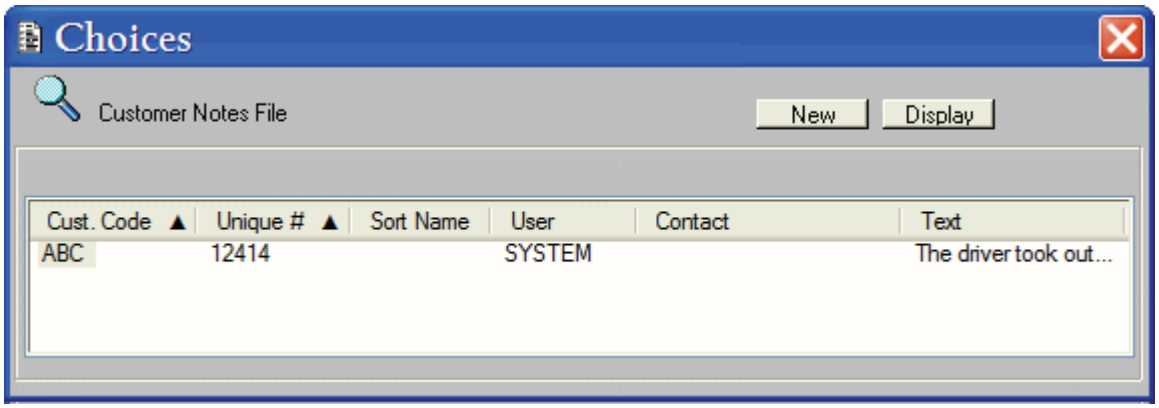
Customer Notes (EDTCNOT1)



The header information is already entered – **Entered Date/Time** and **Entered By**.

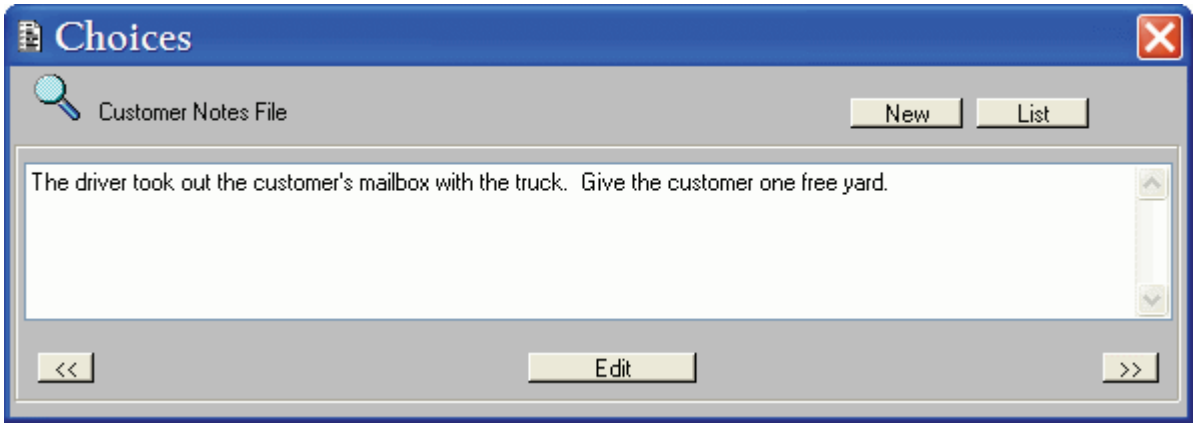
If there are existing notes for the current customer, the **Choices** screen appears. For example, if Notes are accessed from the order screen and there is an order-related note for the customer, the following displays:

Choices



To view an existing note, double-click on the Customer Code or highlight a note and select the **Display** button. A viewing window displays, allowing you to view all notes associated with this order.

Notes Viewer



On this screen, browse through the notes using the arrow buttons at the bottom of the form. To enter a new note, select the **New** button. The Notes editor displays. Pressing the **Edit** button at the bottom of the form will load the current note into the Notes editor.

The **List** button will return you to the list of notes.

3. The **Date/Time** the note was entered and the **User Name** of the person who entered the note is automatically attached to the note.
4. The next section of the Notes screen has a number of fields that are used to assign the note to a particular type of record:

Customer Code	**Project Code**
Job ID	**Quote Code/Revision**
Product Code	**Transaction Code**
Order Date	**Order Code**

These fields are set according to the screen from which the Notes screen was accessed. For example, if you are in Order Entry and select the Project Note button, the system will set the Customer and Project fields for the new note. Similarly, if you select the note button next to an invoice transaction in COMMANDreceivables, the system will set the Transaction Code.

5. Enter the text of your note in the **Text** area. The viewing area will scroll to accommodate a longer note.
6. If you wish to attach a file to the note, select the file path from the **URL** field.
7. Select the appropriate flags for the note. There are two types of flags:
   - **Applies to** - This flag determines which screens are affected by this note. If you select **Orders**, whenever the specified Customer Code is entered on an Order screen the **Notes** button will light up to indicate the presence of an order-specific note. If the same Customer Code is entered on a Transaction Detail screen, the Notes button will not be lit, unless there is another note flagged for **Receivables**.

The system will automatically select the **Applies to** flag that corresponds to the screen that called the Notes from. For example, if you create a note from the Orders screen, the Orders and Tickets flags will already be set when the form opens.

- **Auto Display** - This flag indicates that the note should automatically display when the specified screen is invoked. For example, if an order is given a note with Tickets is flagged for Auto Display, every time that order is retrieved in the Ticketing screen, the note will automatically display, ensuring that the batcher and/or dispatcher sees the note prior to ticking the load.

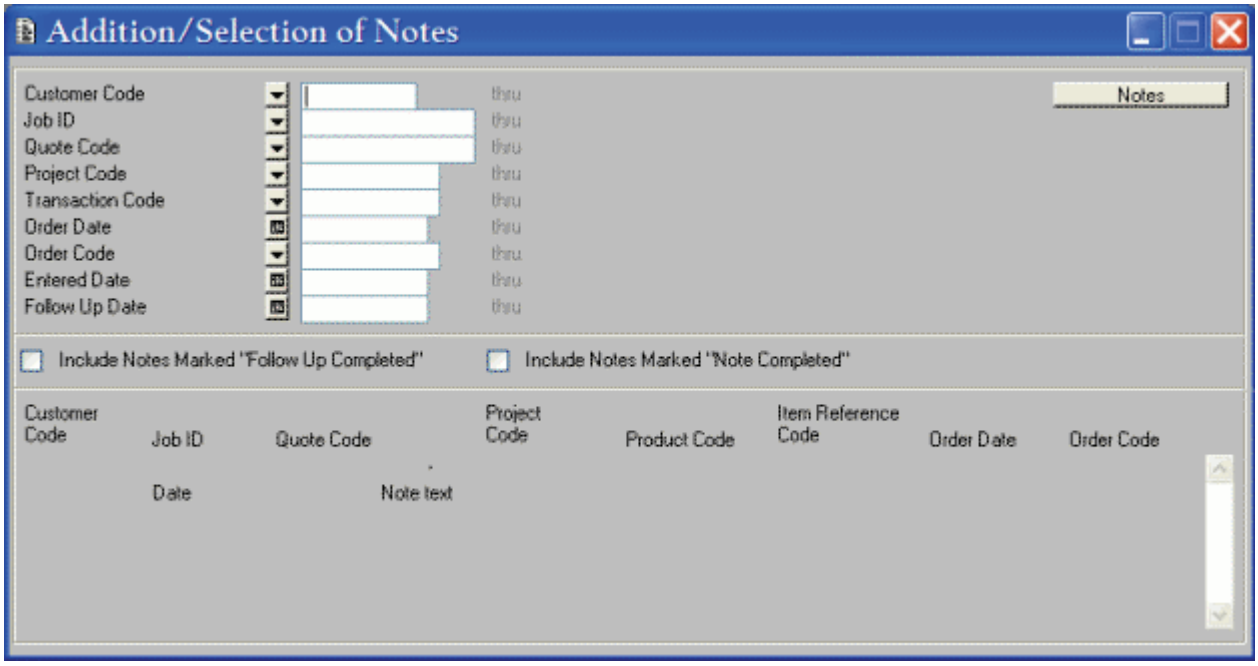
8. Enter a **Note Reason Code**, if necessary.
9. If necessary, enter a **Contact** for the note. For example, if a customer has promised that a given invoice will be paid by a certain date, enter the name of the person who made that commitment.
10. Enter the **Phone Number** and **Fax Number** of the Contact, if any.
11. If the customer has promised that a certain amount will be paid on account, enter the **Commitment Amount**.
12. Enter the promised date in the **Commitment Date** field.
13. Enter a **Follow Up Date**. This is the date on which you want to contact the customer to check on the status of the commitment. This date can be before or after the Commitment Date.
14. The **Follow Up Completed** checkbox allows you to keep track of which follow up calls have been made.
15. The **Note Completed** checkbox allows you to track active notes and purge completed ones.
16. To send a message with the note, complete the bottom portion of the screen.
17. Accept the screen to save the new customer note. The Customer Notes screen will close, and you will return to the prior screen.

Managing Customer Notes

Accessing Customer Notes using the **Notes** button on a primary work screen often does not give you a clear idea of all the notes entered for a customer. The Select Customer Notes screen gives you additional flexibility in viewing and managing customer notes.

To view customer notes:

1. While viewing a primary work screen (Orders, Edit Orders and Tickets, etc.), select **Addition/Selection of Notes** from the **Options** menu. The Addition/Selection of Notes screen displays.



2. The first seven fields allow you to choose data or groups of data to select which notes to display. For example, if you want to display notes for Project Codes 10 through 50, enter those numbers in the **Project Code** fields.

   The filtering is progressive: the screen will initially display all notes, but the list will be pared down as you add more filter criteria.

3. Mark the checkbox next to **Include Notes Marked "Follow Up Completed"** if you want to see those notes.
4. Mark the checkbox next to **Include Notes Marked "Note Completed"** if you want to see those notes.
5. Notes matching the specified criteria display at the bottom of the screen. Double-click on a specific note to display the entire note.

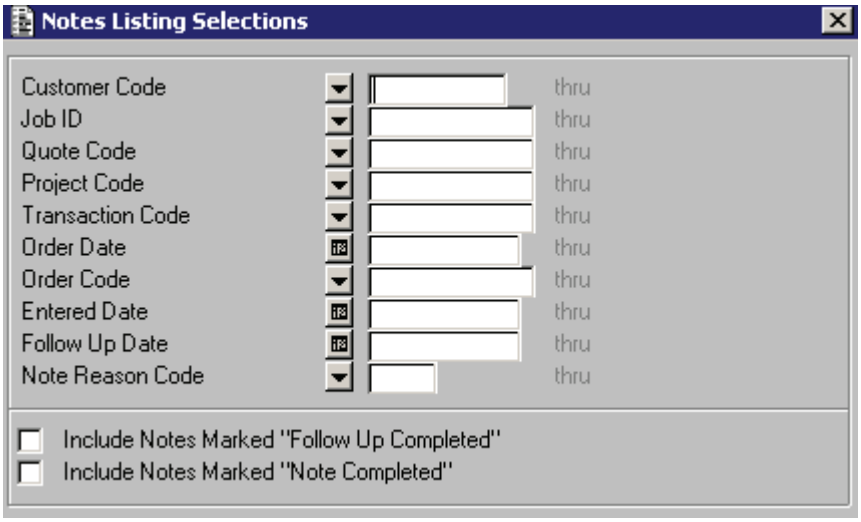
Notes Listing

The Notes Listing function lets you print selected notes. Functionally, Notes Listing is identical to the procedure for viewing customer notes, explained previously; the only difference is that the selected notes are printed instead of listed on the screen.

To print customer notes:

1. Open the Notes Listing screen {Files > General Information > Notes Listing}.

Notes Listing Selections (SELCNOTE)



2. The fields in the top portion of the screen let you choose data or groups of data to select which notes display. For example, if you want to display notes for Project Codes 10 through 50, enter those numbers in the **Project Code** fields.
3. Mark the checkbox next to **Include Notes Marked "Follow Up Completed"** if you want to see those notes. A Receivables clerk, for example, might run a listing once a week to return a list of notes for which follow up calls are required this week.
4. Mark the checkbox next to **Include Notes Marked "Note Completed"** if you want to see those notes.
5. **Accept** the screen. The **Print Models** screen appears.
6. Select the appropriate print model to generate and print the Notes Listing.

Dispatch Memos in Order Entry

COMMANDseries provides an easy means to add dispatch-level notes to orders.

- Users can enter dispatch memos on the standard/simplified order screens and on the Concrete Ticketing screen.
- Notes can be added while an order is being entered.
- Order-specific notes (including dispatch memos) can be printed on several dispatch reports.

This feature is intended for concrete orders. While dispatch memos can be entered on an aggregate order from the standard orders screen, they cannot be added from the various dispatching and ticketing screens.

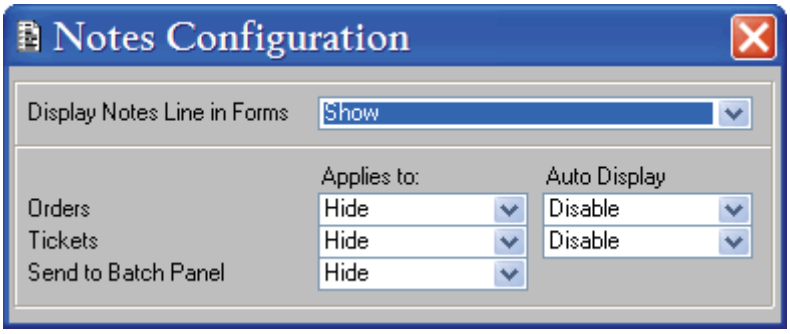
Configuration

Even though they are entered differently, dispatch memos are stored as order-level customer notes. Some configuration is needed to streamline the process.

To configure dispatch memos:

1. Open the Configuration > Distribution tab {Files > General Information > Configuration > Distribution}.
2. Select the **Notes** button. The **Notes Configuration** screen will display.

Notes Configuration (EDTCNFXT)



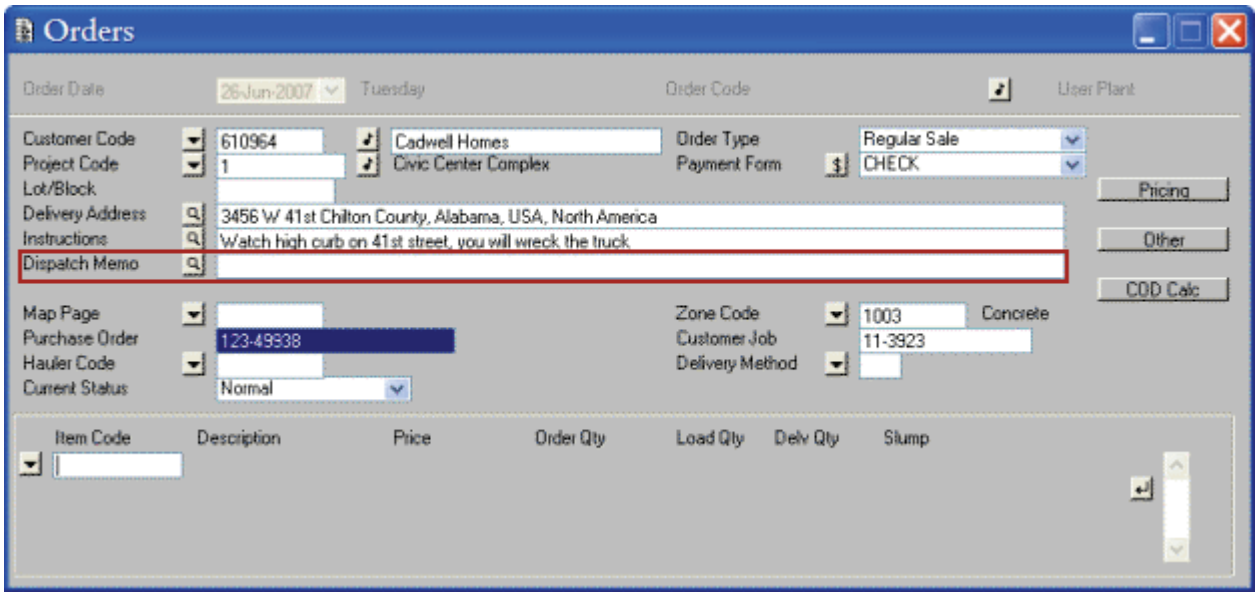
3. Set the **Display Notes Line in Forms** field to **Show**. When Show is selected, a **Dispatch Memo** field will display on the Orders, Simplified Orders, and Tickets screens.

   Setting **Display Notes Line in Forms** to **Hide** will disable the auto-display of all order-level notes, including those entered prior to this modification.
4. The remaining fields configure default settings for all order-level notes, not just dispatch memos.
   - The **Applies to** options let you establish whether dispatch memos are to be assigned to orders, tickets, and/or batch panels. Users will not have access to the standard Notes editor from a dispatch memo, so these fields establish the system-wide settings.
   - The **Auto-Display** flag enables the customer notes auto-display function for all dispatch memos.
5. **Accept** the Notes Configuration screen and the Configuration screen.

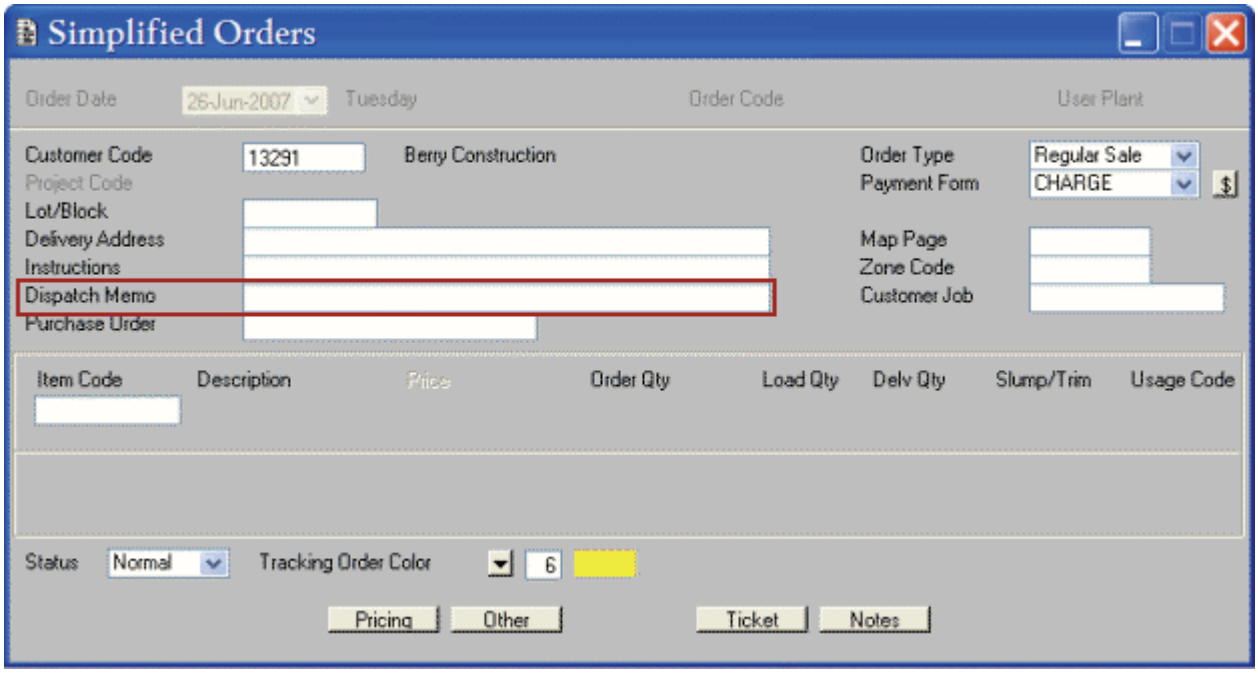
Operations

A dispatch memo field will now display on the Orders, Simplified Orders, and Ticketing screens.

Concrete Orders



Simplified Orders



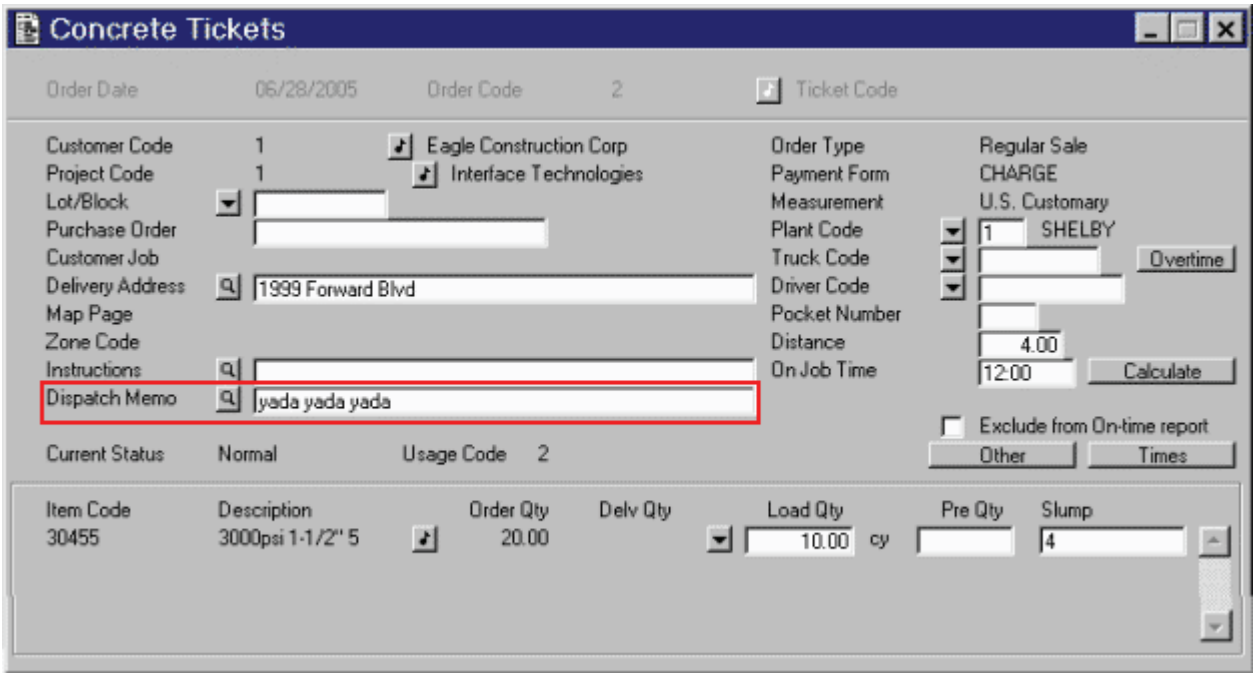
Dispatch memos can be entered on a new order without having to save the order and then retrieve it. Detailing on the field will open a zoom box for longer notes.

When the order is retrieved in order entry or ticketing, the information will display in the field. If dispatch memos are configured for auto-display, the memo will display in the standard notes auto-display window. From there the screen can be closed or the full Customer Notes editor opened.

Because of space restrictions on the Aggregate Orders screen, if dispatch memos are enabled, job tracking fields (**Job Phase** and **Phase Code**) are moved to the Other Order Information screen.

Dispatch memos can be viewed and entered in the Concrete Tickets screen, but not in aggregate ticketing and dispatch screens.

Concrete Ticketing



Reports

The following dispatch reports print order-specific customer notes (which includes dispatch memos):

- Order Report
- Order Recap Report
- Ticket Report

The selection screens for all of these reports have a new checkbox, **Include Order Specific Customer Notes**, to control the inclusion of notes on the reports.

Note: Order-specific notes will not print for aggregate orders.

Deleting, Managing & Purging Completed Notes

If a company uses customer notes extensively, old notes can pile up in the database in a relatively short period of time. That is why it is important to manage and purge the customer notes in the system on a regular basis.

Deleting Notes

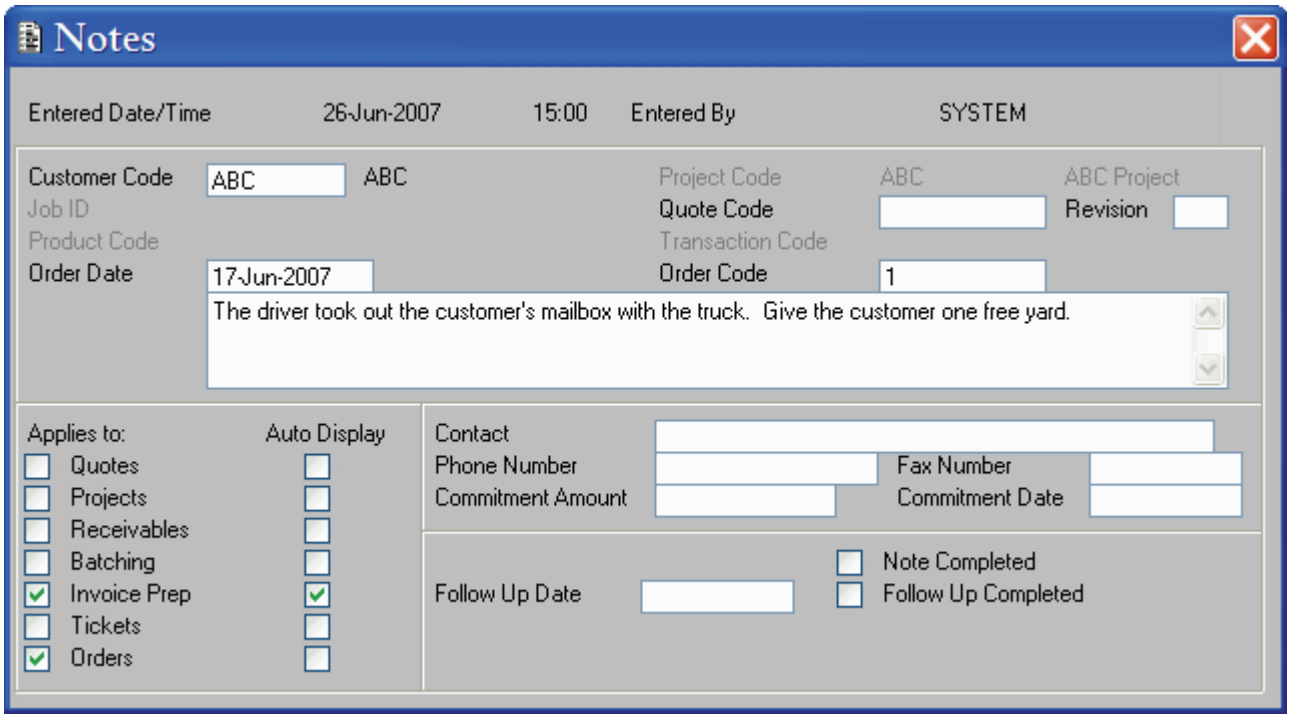
To delete a single note:

1. Retrieve the note in question.
2. Select the Remove Record button or press <Shift+F5>.

Managing Notes

All notes have a **Note Completed** Checkbox in the lower right of the main Notes screen:

The Note Completed box



Managing notes is a matter of making sure that the **Note Completed** flag is set once the terms of the note have been addressed.

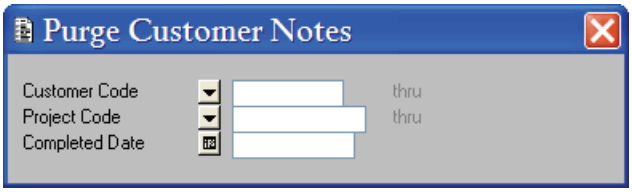
Purging Notes

Purging Notes lets you delete old notes in bulk. There is only one key consideration: a note cannot be purged unless it has been flagged as completed.

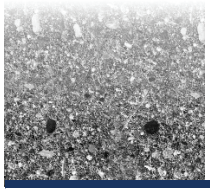
To purge completed notes:

1. Open the Purge Customer Notes screen {Manage > Application Management > Purge Customer Notes}.

Purge Customer Notes screen (DBACNOT)



2. Enter a range of **Customer Codes**, **Project Codes**, and/or **Completed Dates**.
3. **Accept** the screen.



COMMANDconcrete Reports

In the highly competitive construction materials market, decision makers in your organization need access to various levels of information quickly and easily. With this in mind, COMMANDconcrete includes a large collection of reports that display relevant information in a way that it is easily accessed and processed.

Topics in this section:

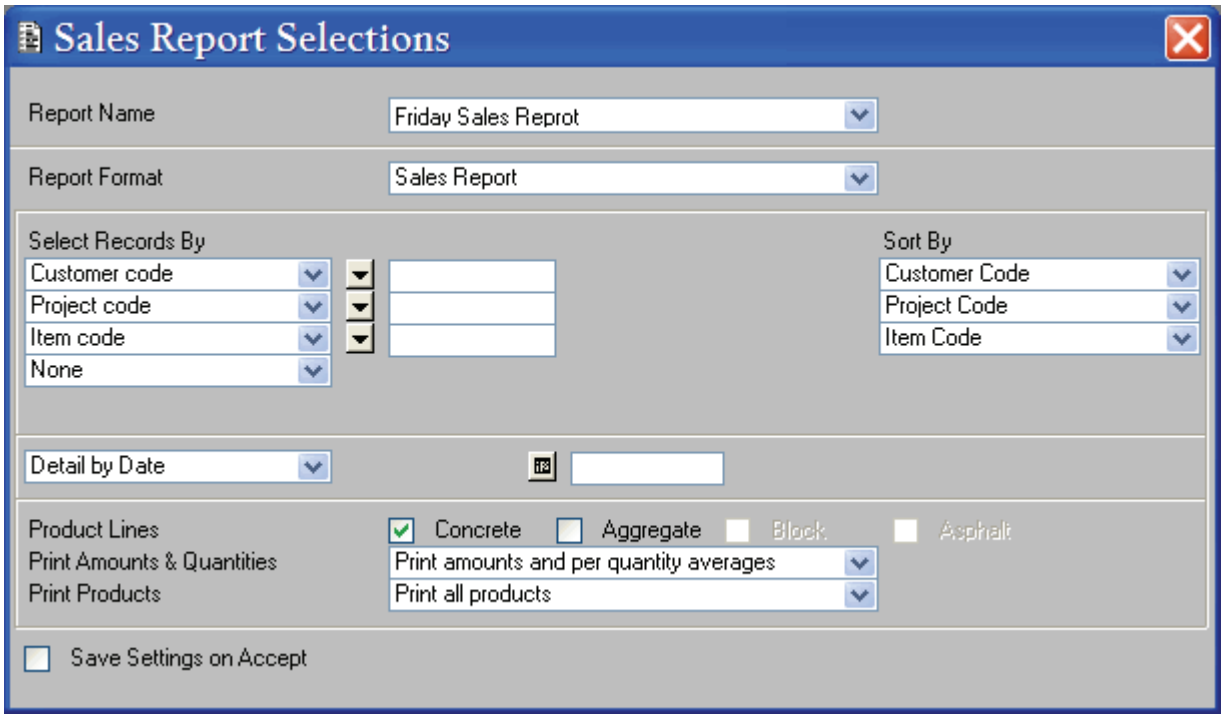
Generating Reports
Scheduling Reports
Dispatching Reports
Time Analysis
Payment Option Reports

Generating Reports

The COMMANDseries suite of applications provides a common method for generating reports.

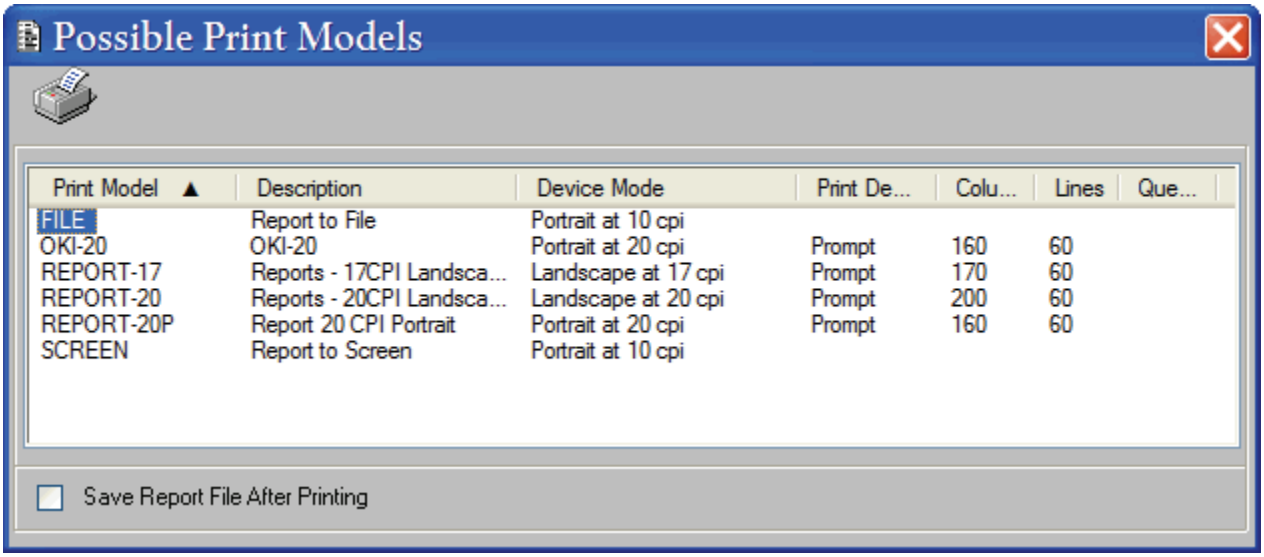
To generate a report:

1. When you select the Print Report function from a COMMANDseries application, a Report Selections dialog box displays. This dialog box prompts you for parameters to customize the information you want displayed on the report. A sample setup screen is displayed here:



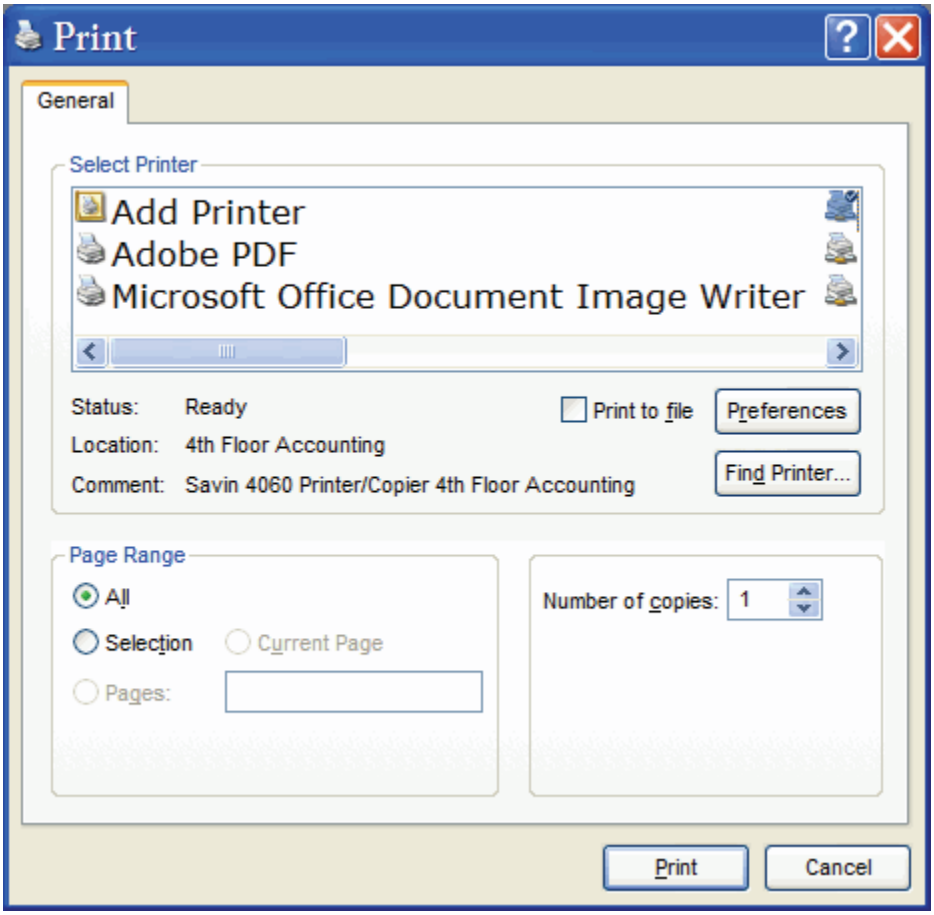
2. After you have entered the specific report information, the **Possible Print Models** screen displays. This lists the output methods available with which to generate the report. Print models are defined using the Print Models editor in the System menu.
3. There are four ways to generate reports from the **Possible Print Models** screen:
   - **Printer** - Lets you choose a specific printer for a hard copy printout of the report.
   - **Report to Screen** - Lets you view the report on the screen rather than print a hardcopy.
   - **Report to File** - Automatically saves the report into a **`WINDOWS/TEMP`** directory.
   - **Report to WordPad** - Lets you create a text file and save in **`.txt`** form in WordPad for editing and other purposes.
4. Select a printer using the scrollable list. The system knows the formatting and printing requirements your report, so only appropriate print models will be listed. Check the **Save Report File After Printing** checkbox to save the report to disk for later printing or viewing. Highlight the print model and **accept** the screen.

Possible Print Models (FNDUPRT)



5. After you select an available printer, the standard Windows print dialog box appears. Press **OK** to print the report.

Print Setup



Scheduling Reports

Scheduling reports show the commitment of trucks in each plant, plant capacity, and commitment for the total fleet. They allow dispatchers to look ahead to the next day's deliveries. Other reports show order schedules, dispatch truck schedules, and load suggested driver callout report.

Topics in this section:

Order Schedule Report

Truck Demand Graph

Plant Loading Report

Driver Callout Report

Dispatch Sheet Report

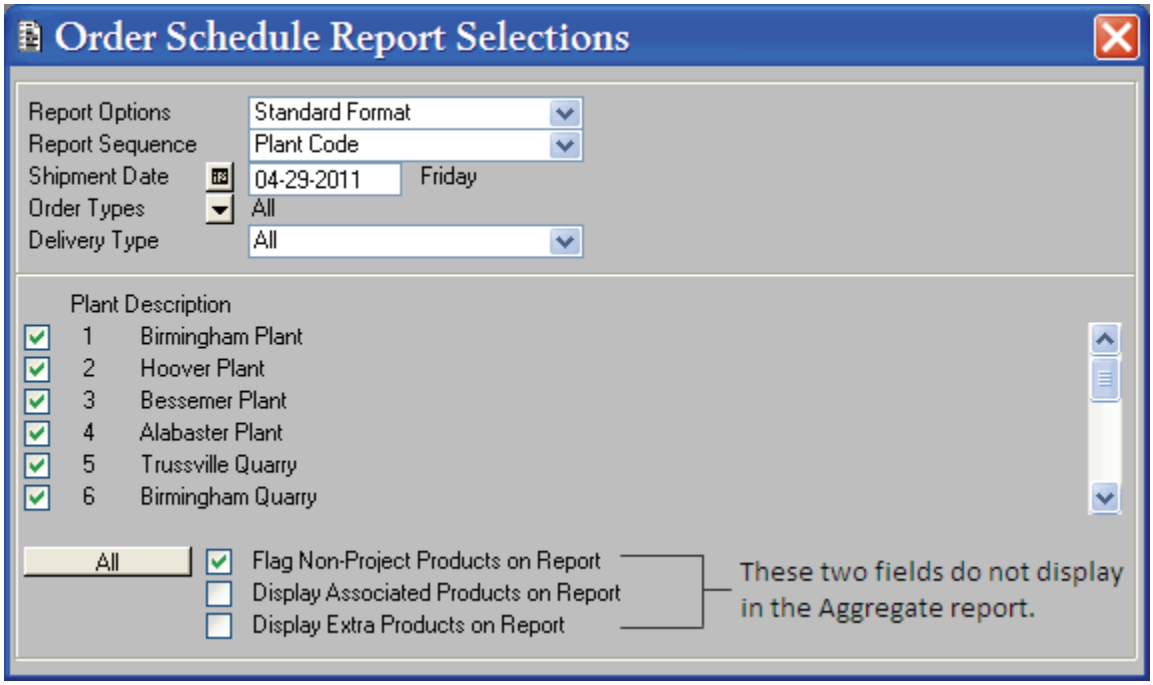
Order Schedule Report

The **Order Schedule** report provides information about orders to see which customer orders are on the schedule for a particular day. You can specify the plant(s), order type(s) and scheduling date on which you want to report. Also, you can sort the reports by schedule plant or schedule start time.

The Order Schedule report includes plant, schedule, and quantity information generated in the **Order Line Scheduling Information** screen. It provides the shipper with information on start time, travel time, and rate of deliveries. It also shows the quantity of ordered product, the type of truck designated for the job, and the number of trucks required. The report supports two **Report Options**:

Standard Format runs the report using the existing format.

Project Name Format uses a new format that includes the Project Name. To make room for the Project Name, the Truck Type, Trucks Required, and Zone Code fields have been removed.



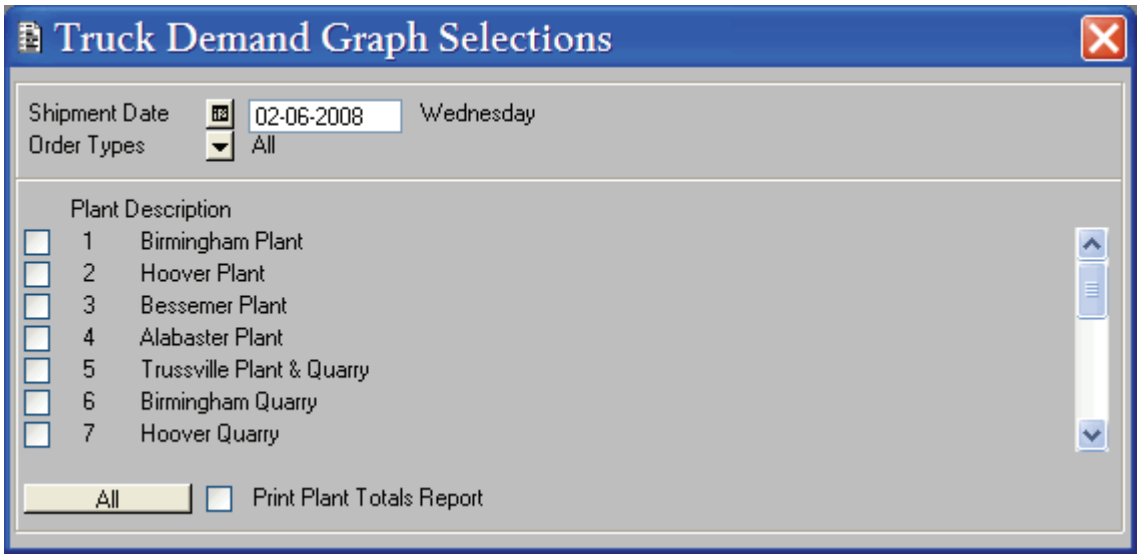
Truck Demand Graph

The **Truck Demand Graph** generates information on the number of trucks needed at specific dates and times. It breaks down the number of trucks necessary to meet the delivery needs for confirmed, weather permitting, and will call orders, and displays these in a graphical format.

The Truck Demand Graph is used to determine truck requirements and when to take new orders (if dynamic scheduling is not being used). You can specify the plant(s), order type(s) and shipment date on which you want to report.

The Tracking and Scheduling screen provides a real-time demand graph. If you have a license for Tracking and Scheduling, you may not need the Truck Demand Graph.

Truck Demand Graph Selections (SELTRKG)

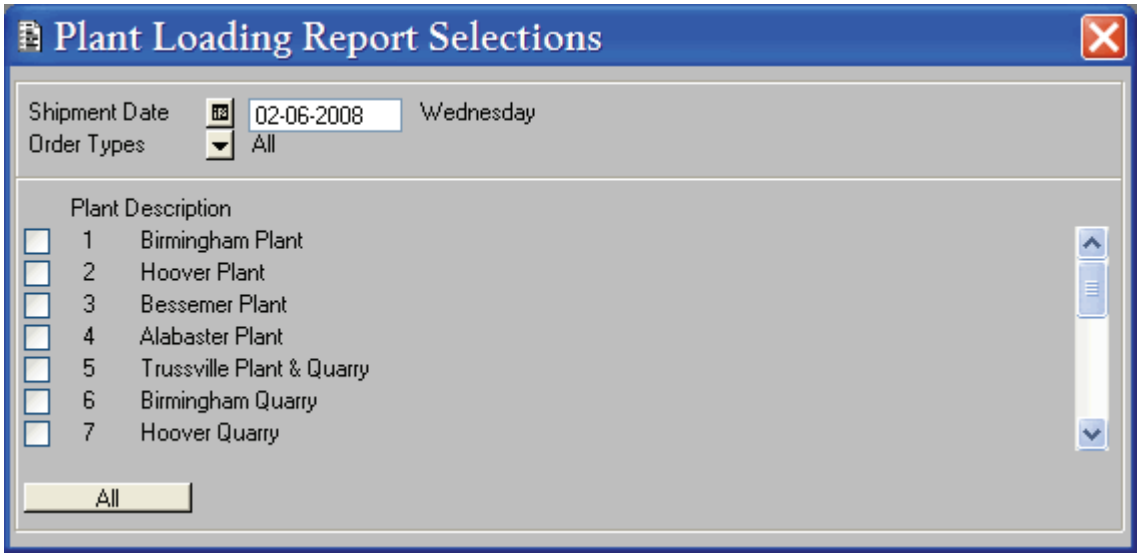


Plant Loading Report

The **Plant Loading** report shows plant loading demand in 15-minute intervals. This information is used to determine if the plant is overloaded. You can specify the plant(s), order type(s), and shipment date on which you want to report.

The Plant Loading report shows the date and time that each order needs to be loaded, along with the total load quantity for the specified date and time. It also breaks down each order by plant, showing the required quantities from each plant for each order.

Plant Loading Report Selections (SELPLTL)



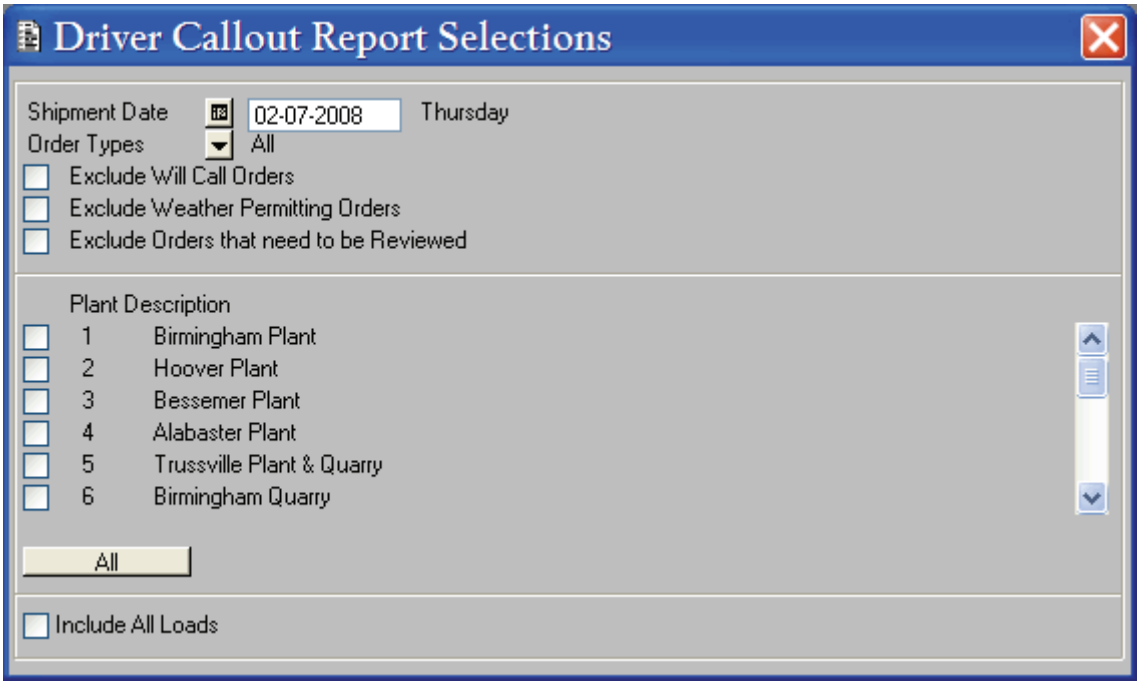
Driver Callout Report

The **Driver Callout** report uses the booked delivery schedules, along with start up information from the plant and truck type files, to generate a schedule showing when drivers need to clock in to be able meet the delivery schedule. You can specify the plant(s),

order type(s), and shipment date on which you want to report. You can sort the reports by schedule plant or schedule start time.

The Driver Callout report is used by the scheduler in the evening to call drivers for the next day's work. The dispatcher can also use this report in the morning to plan the first round of deliveries. The report shows the required punch-in time to load and deliver the order on time. It also shows the type of truck needed to deliver the order and leaves a blank for the dispatcher to write in the driver's name.

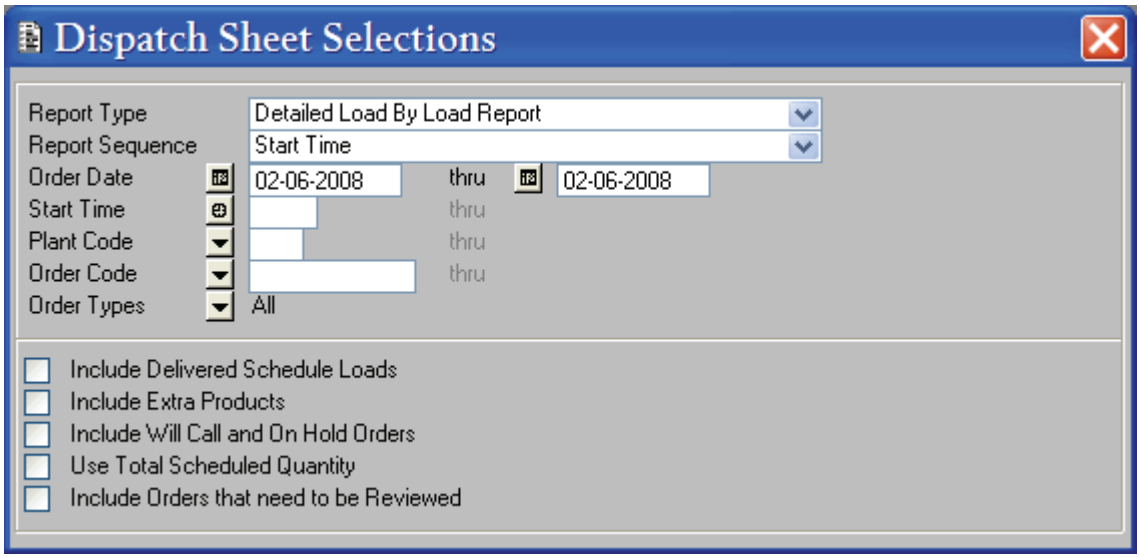
Driver Callout Report Selections (SELDRVC)



Dispatch Sheet Report

The **Dispatch Sheet** report generates a list of the remaining loads to be delivered. This information can be used in the event of a critical system malfunction.

The Dispatch Sheet provides basic order information, including required load time, plant, and order size. Because of its use as a backup, it is generally run several times during the day.



Dispatching Reports

Dispatching Reports provide summarized information from a specific day or days dispatching business. COMMANDseries provides several dispatch reports. These reports generate information regarding orders, both delivered and non-delivered, with their ticket information, total quantities for products, complete plant production data, raw materials needed for future business, and batch weight comparisons.

Topics in this section:

Order Report
Ticket Report
Enhanced Ticket Report
COD Recap Report
Order Recap Report
Plant Production Report
Customer Sales Recap Report
Inventory Usage Report
Product Sales/Usage Report
Raw Materials Requirements Report
Batching Comparison Report
Batch Info Report
Order Audit Log Report

Order Report

The Order Report provides three report types, each showing various levels of information about orders. Each level of information builds upon the previous one, as described below:

- **No detail** - Produces a one-line listing of orders, showing order date, order code, customer and project codes, and delivery address.
- **Minimum detail** - Produces a listing that includes pricing information, taxing information, and various other information related to the order.
- **Full detail** - Includes all information shown above, plus extra product information for the order.

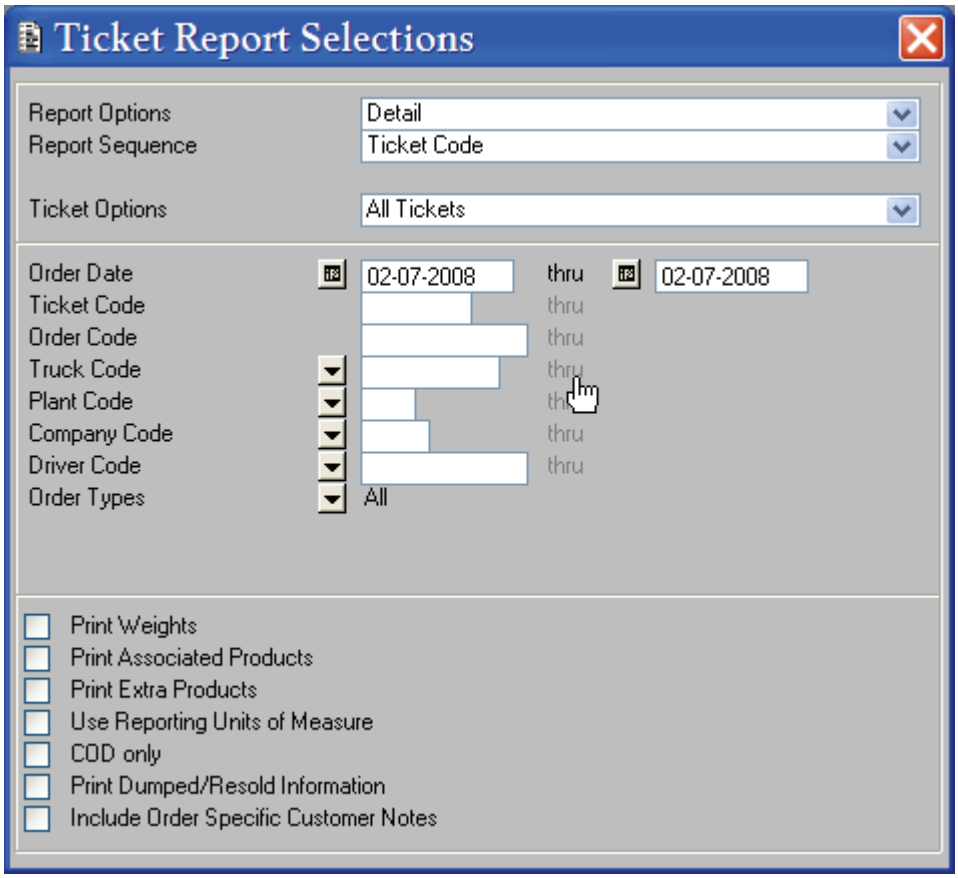
The Order report is a one-line scheduling report, showing comprehensive delivery information for each order for a particular day.

The Order Report Summary option displays item information in the same format as the Detail option. Select **`Summary with Product Detail`** to view information in this format.

Ticket Report

The Ticket Report produces a listing of tickets generated. It is a single-line report that shows basic information about each ticket. The report can be sorted by ticket code, order code, or a list of other selections (e.g., order date, ticket code, hauler code, etc.).

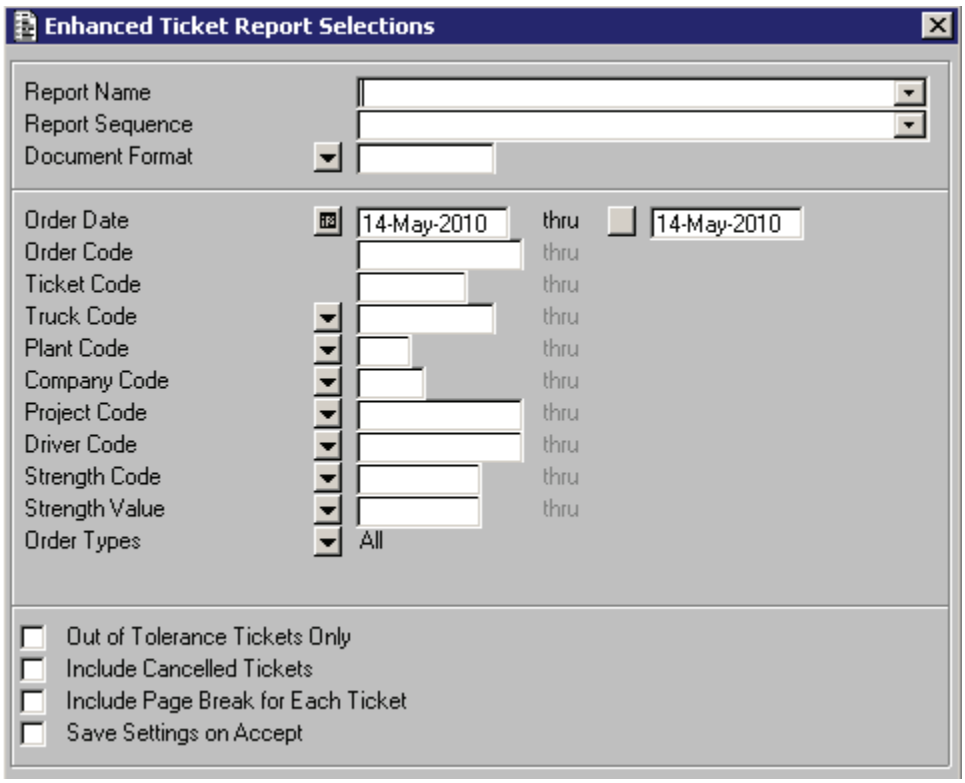
The Ticket Report displays a specific day's activity relating to a certain customer, plant, or truck. Canceled tickets are marked with a dash (**-**), and a plus (**+**) represents a missing ticket number. An asterisk (*****) beside the product indicates that the value does not effect inventory quantity. The Ticket Report can also be printed with weights.



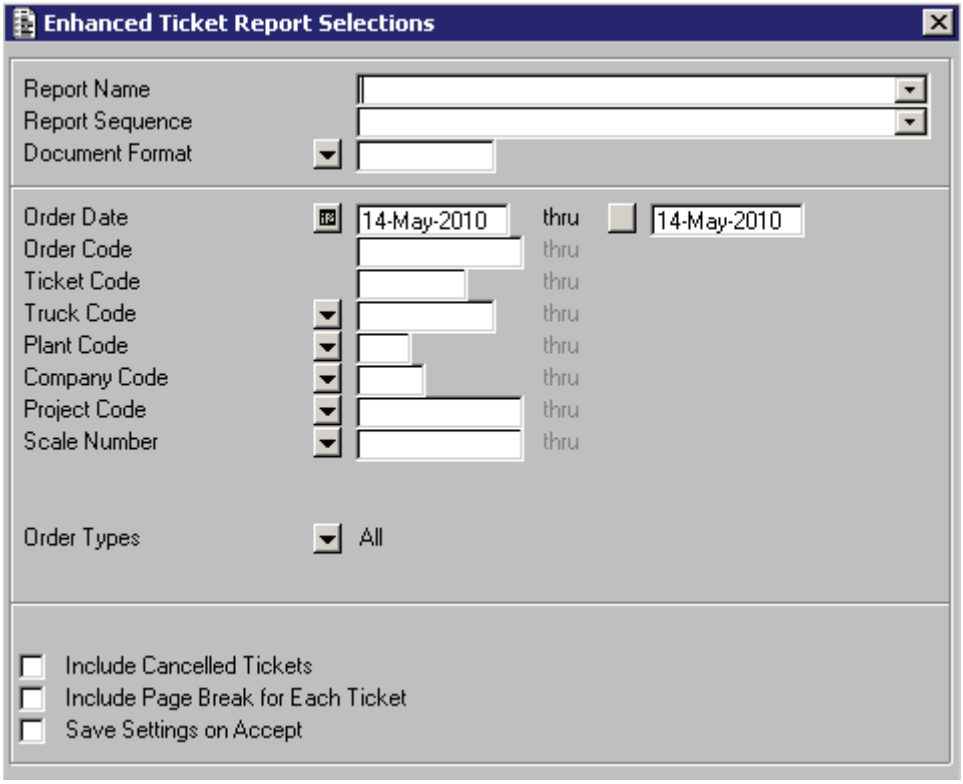
Enhanced Ticket Report

The **Enhanced Ticket Report** prints a list of all tickets that are actually produced for the day or date range you select. This report gives you the ability to produce ticket reports based on your individual requirements.

Enhanced Ticket Report (SELENTK) - COMMANDconcrete



Enhanced Ticket Report (SELENTK) - COMMANDaggregate



Standard report functionality applies to both the Concrete and Aggregate versions of this report. In addition, full form and field-level security is available for this report.

- Detail in the **Document Format** field to choose from a list of all Ticket Print and Ticket Data In/Out document format types. This field is required.
- If the report is run from Aggregate, you can select tickets based on a range of **Scale Numbers**; if the report is run from Concrete, you can select tickets based on a range of **Driver Codes**.
- If you select tickets based on a range of **Strength Codes** in Concrete, the Strength Code value will be taken from **STRGTH_CODE.ORDL** and **STRGTH_VALUE.ORDL**.
- All user-defined order types are available for selection when you detail in the **Order Types** field.
- Select **Include Page Break for Each Ticket** to print each ticket record on a separate page.
- The report page header will be the same as the header for the existing Ticket Report.
- There is no separator (such as a horizontal line) after each ticket; if you wish to have one set up, it must be included in the selected Document Format.
- The report footer will be the same as the footer for the existing Ticket Report and will display summary and quantity information for the number of records selected.

Document Tags

The following calculation document tags have been created for Ticket Print and Ticket Data In/Out to enable printing of batch-related information, similar to what is seem on batch reports.

- **WGTDI0** - Difference of Actual and Target Weights
- **WTDFP0** - % Difference of Actual and target Weights
- **THEWA0** - Theoretical Water Content
- **FRWPT0** - Free Water per Meter
- **TOTAG0** - Total Water in Aggregate
- **DOSWA0** - Total Dosed Water
- **AMRLW0** - Amended Real Water
- **TOTAW0** - Total Actual Weight Being Batched
- **ACTPM0** - Total Actual Weight per m3 Being Batched
- **TOBTW0** - Total Target Weight Being Batched
- **BUTRP0** - Total Target Weight per m3 Being Batched
- **TOACE0** - Total Actual Cement
- **TOTCE0** - Total Theoretical Cement
- **DIFCE0** - Difference between Target and Actual Cement
- **VARCE0** - Theoretical and Actual Variance
- **TOTCE1** - Total Theoretical Cement

- **TCTCE1** - Total Theoretical Cementitious Material
- **TETCE1** - Total of Theoretical Cement and Total Theoretical Cementitious Material
- **TOACE1** - Total Actual Cement
- **TCACE1** - Total Actual Cementitious Material
- **TEACE1** - Total Actual Cement and total Actual Cementitious Material
- **DIFCC1** - Difference in Theoretical and Actual Cement only
- **VARCC1** - Variance for above
- **DIFCT1** - Difference in Theoretical and Actual Cementitious Material only
- **VARCT1** - Variance for above
- **DIFCE1** - Difference in Theoretical and Actual Total Cement and Cementitious Material
- **VARCE1** - Variance for above
- **DOSWDD** - Total Theoretical Water.
- **DIFWDD** - Difference in Total Theoretical Water and Actual Water
- **VARWDD** - Variance in Total Theoretical Water and Actual Water
- **DOSWTT** - Total Water only without the Water on Board
- **DOSWRT** - Total Recycling Water only
- **TARAGG** - Total Target Aggregate
- **ACTAGG** - Total Actual Aggregate
- **DIFAGG** - Difference in Actual and Target Aggregate
- **VARAGG** - Variance of Actual from Target Aggregate.
- **DIFWCR** - Difference in Actual and Theoretical Water Cement
- **VARWCR** - Variance for above
- **IFPM1** - Difference in Total Actual Weight and Theoretical Weight per unit Mix Design
- **VARPM1** - Variance for above
- **KVALUE** - Total K-Value
- **TOTWA0** - Total water in aggregates per cycle

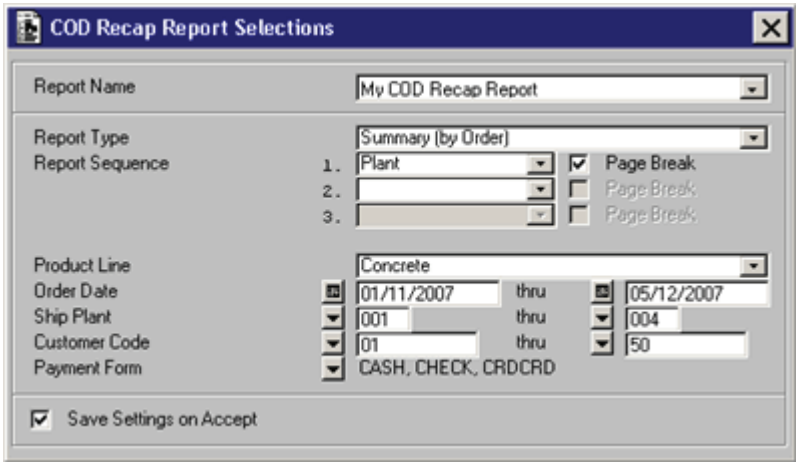
COD Recap Report

The COD Recap report provides a means of reconciling cash, checks, and credit slips collected during the day. The report lists COD sales, sorted by multiple parameters.

The report uses payment forms to differentiate different types of COD entries. Reporting options will be restricted to whatever payment forms are configured in your system.

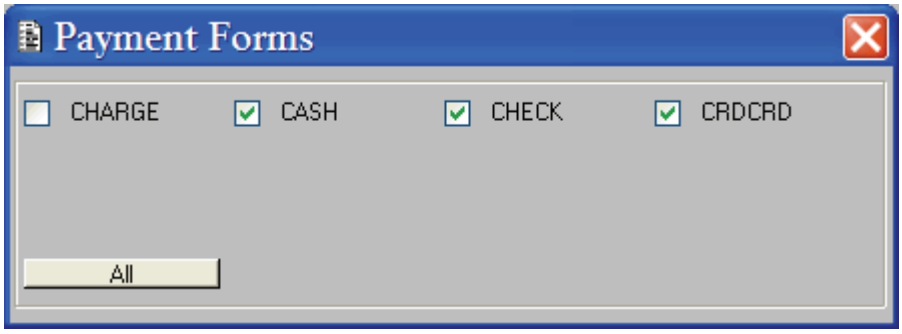
To run a COD Recap report:

1. Open the **COD Recap Selections** screen {Dispatch > Dispatching Reports > COD Recap Report}.



2. Enter a **Report Name** if you want to save this specific configuration for repeated use. (You will also need to select the **Save Settings on Accept** checkbox.)
3. Select a **Report Type**. The options are
   - Summary (by Order)
   - Detail (by Ticket)
4. Enter the **Report Sequence**. You can set primary, secondary, and tertiary sort keys. In addition, you can force a page break between sort keys by selecting the checkbox.
5. Select a **Product Line**.
6. Enter an **Order Date** or date range.
7. Enter a **Shipping Plant** or Shipping Plant range.
8. Enter a **Customer Code** or Customer Code range.
9. The default selection for **Payment Form** is **All**. Should you need to adjust this setting, select the **Detail** button, to the left of the field. A selection box appears.

   Select any combination of Payment forms.Select the desired payment forms and accept the screen



   to return to the main selections screen.
10. If you wish to save the configuration for later use, select the **Save Settings on Accept** flag. You must also have entered a **Report Name** at the top of the screen.
11. **Accept** the screen to generate the report.

Order Recap Report

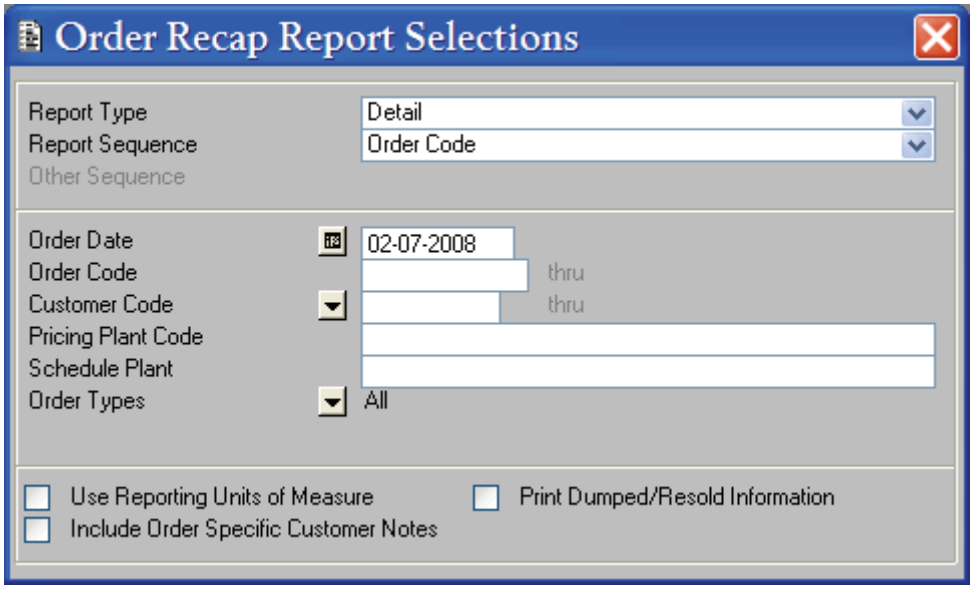
The Order Recap report is used to report orders that have been entered in the system. This report shows which ticket was given to particular customers, as well as who delivered the order. You can report on orders and sort them by order code, project code, customer code or plant code. You can also select from an additional list of sort selections, such as order date, order status, etc.

The Order Recap report is used by the Dispatch Manager and/or Billing Clerk to analyze a day's business. This report generates a list of all the orders that have tickets printed on them for a specific date. Use the sequence function of this report to show relevant information, such as deleted/non-delivered orders, which indicates prohibitive weather or job-site, delivery, or availability problems.

To ensure that FOB orders that get ticketed to a truck are still reported as FOB orders, the Order Recap Report determines whether an order is delivered or FOB Reports using the following rules:

- **Delivered:** The delivery method is not blank and the delivery type is "delivered."
- **FOB:** The delivery method is not blank and the delivery type is "FOB."
- **FOB:** The delivery method is not blank and the delivery type is "delivered/FOB" AND the truck code is blank .
- **Delivered:** The delivery method is not blank and the delivery type is "delivered/FOB" AND the truck code is not blank.
- **FOB:** The delivery method is blank and the truck code is blank.
- **Delivered:** The delivery method is blank and the truck code is not blank.

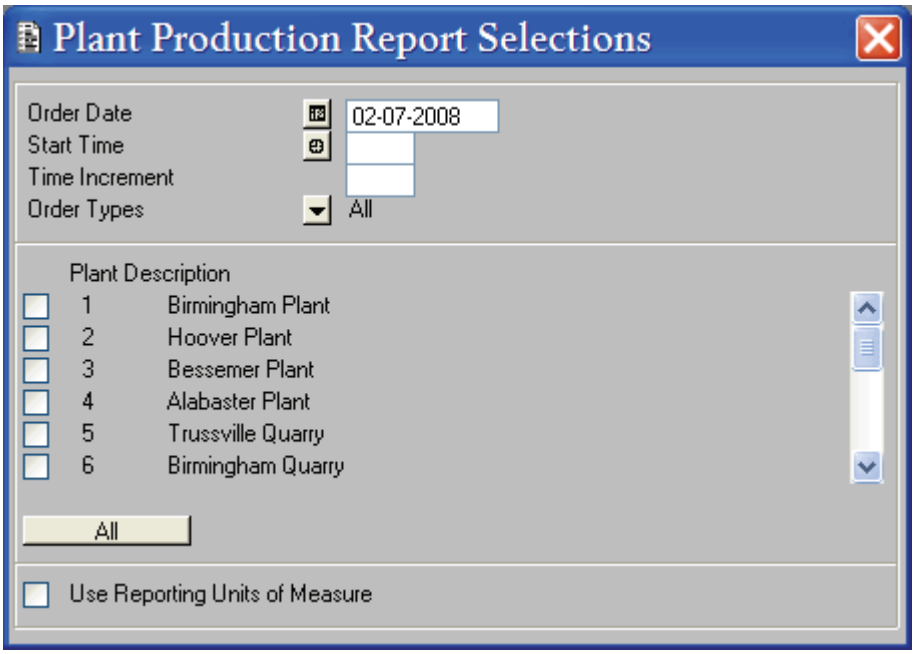
Order Recap Report Selections (SELRCAP)



Plant Production Report

The Plant Production report is used to show the volume of weighed product sold for each plant. This report can be sorted by plant and hour. A table will be generated, showing the total weighed product quantities to be produced at each plant, each hour.

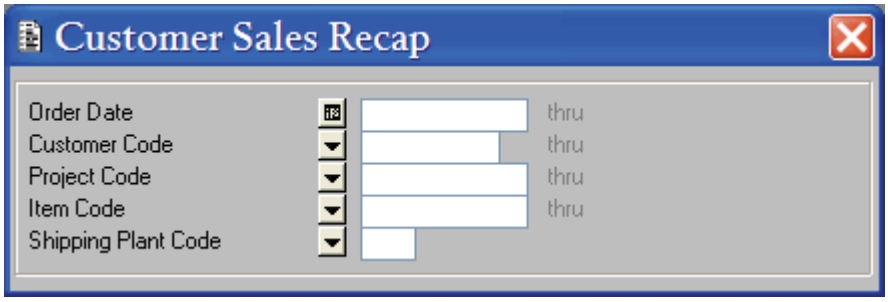
Plant Production Report (SELPLTP)



Customer Sales Recap Report

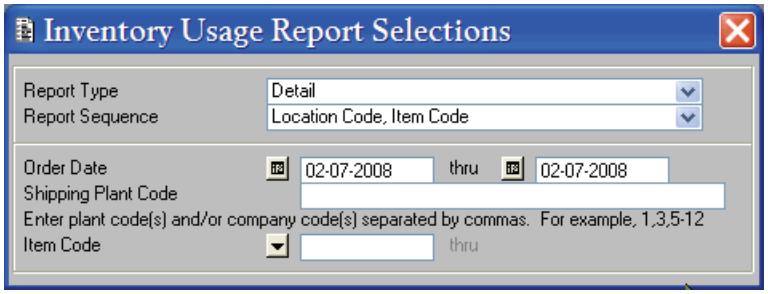
The Customer Sales Recap report retrieves data from daily order and ticket records. It provides a summary of the total quantity shipped for the selected customers, projects, items, and shipping plants for the specified date range.

Inventory Usage Report



The Inventory Usage report shows the inventory items used at each location, according to the selection criteria. It shows how much of the item was used, the ticket code and inventory levels, and a total for each location. This report is a very useful way of getting an overview of inventory.

Inventory Usage Report Selections (SELIUSG)

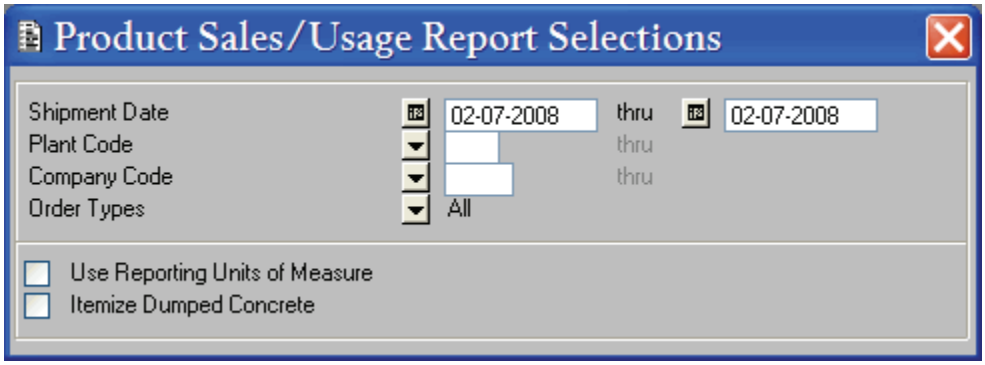


Product Sales/Usage Report

The Product Sales/Usage Report provides information on the volume of weighed product, associated, and extra products sold and the amount of aggregate used to make the products.

The report includes a Mix Product Sales section, which shows a number of totals. One useful figure shown in this section of the report is the returned concrete figure. This is a combination of the dumped and reused concrete.

Product Sales/Usage Report Selections (SELPSLS)

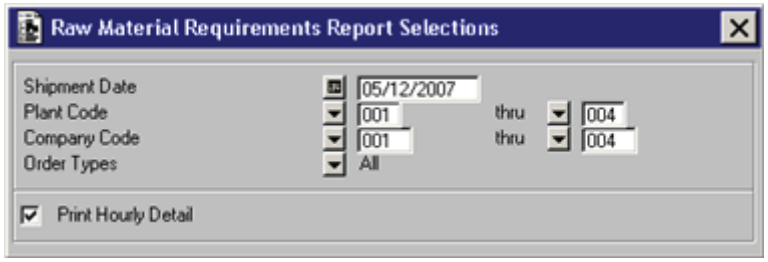


Raw Materials Requirements Report

Use the Raw Materials Requirements Report to determine the raw material needed for future production. The report shows data on associated products, constituent products, and extra products for each plant, as well as the average material consumption.

You can generate this report to include a desired range of shipment dates, shipment plants, and companies. In addition, you can print the report with hourly detail, which illustrates the amount of each product that must be produced at each plant to fill the orders for the day(s) on the report.

Raw Materials Requirements Report (SELMATR)



Batching Comparison Report

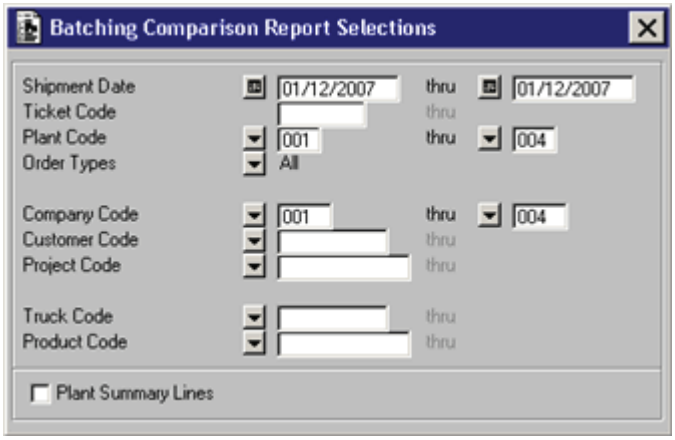
The Batching Comparison report shows the COMMANDconcrete target batch quantity, the batching unit's actual quantity, and if an Eagle unit is being used, the Eagle's target quantity. The report also displays the variance of these quantities. The Batching Comparison report is used for QC purposes as well as for the projection of raw material requirements.

This report will only provide useful data if you have a two-way batch interface, which allows individual ticket weights to be uploaded to COMMANDseries. If a two-way interface is not present, the report will only show target weights based on mix design.

The report includes a summary level at the bottom that lists the constituent materials and summarizes the actual and target weights used for each product used in the selected time period. The summary level is generated when the report has been requested with only the plant code and date ranges selected as input parameters. Deviations in the batched weights compared to the actual weights are shown in the relevant unit of measure and as a percentage of the target weight. In addition to this, the average actual material consumption for the batches selected in the report is also now calculated and displayed.

When the The **Include Removed Tickets** checkbox is selected, removed tickets will be displayed on the associated report with a minus sign (-) next to them. The Remove Reason Code and its description will display as well. Additionally, the total volume will display after each ticket detail under both the Target and Actual columns.

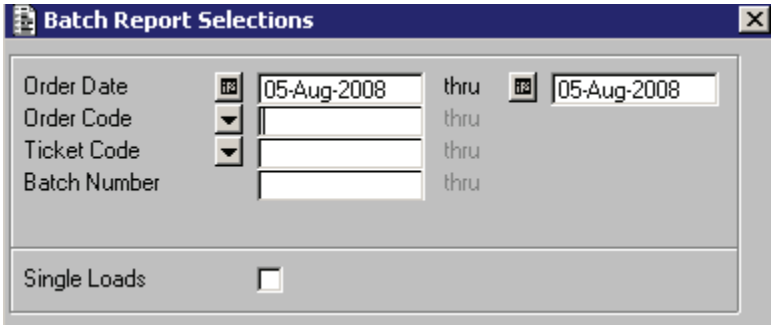
Batching Comparison Report (SELBCMP)



Batch Info Report

The Batch Info Report is used to present data imported from the batching system. This can be printed at the time of batching to present to the customer with the ticket. It shows the customer a technical specification for the actual quantities they are receiving. This is a very helpful tool to ensure consistent quality concrete for the customer.

Batch Report Selections (SELBATR)



When the Batch report is run for multiple, batches/loads, the averages and sum totals of the Measurement fields will be displayed in the following fields in a new Measurement section:

- Total Mixing Time (average and sum)
- Mixer Time (average and sum)
- Actual Power Consumption (average and sum)
- Concrete Temp (average only)
- Ambient Temp (average only)

In each case, averages will reflect the sum divided by the number of loads. Each average will be rounded up to the nearest whole number.

When no **OLPD** record is present, the system will use the **ILOC** record for Recycled Water. For solid material spec gravity, the system will use **CNF2** if no **ILOC** or **OLPD** record is present.

Order Audit Log Report

The Order Audit Log report is used to view response data from customized prompts set up on the **Configuration** screen {Files > General Information > Configuration}. The prompts appear upon acceptance of an order.

The Order Audit Log report shows user responses to customized order acceptance prompts. The information can be sorted by order date, order code, customer code and/or shipping plant.

Time Analysis

The Time Analysis menu {Dispatch > Time Analysis} has a number of options that can be used to generate reports that give information on the various timings recorded in the system.

Topics in this section:

Driver Times and Truck Times

Order Snapshot Report

On Time Delivery Report

Time Analysis Reports

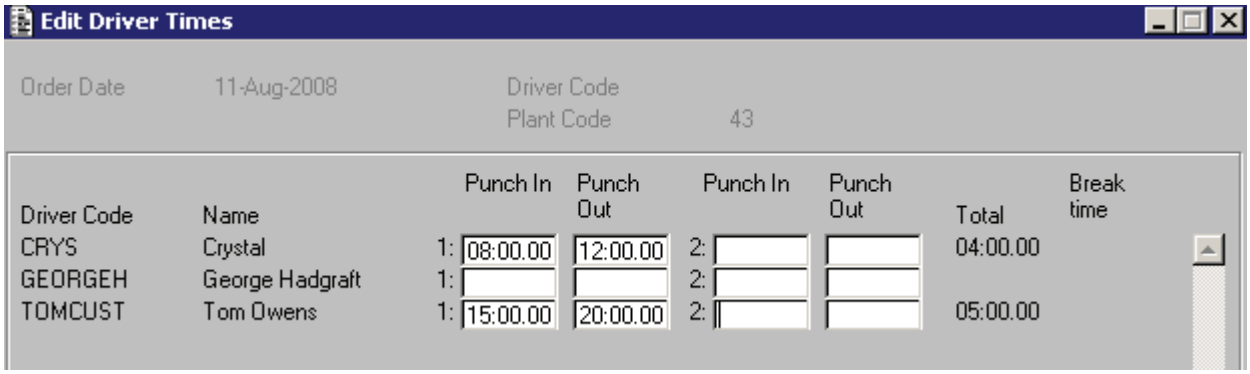
Missing Times Report

Overtime Report

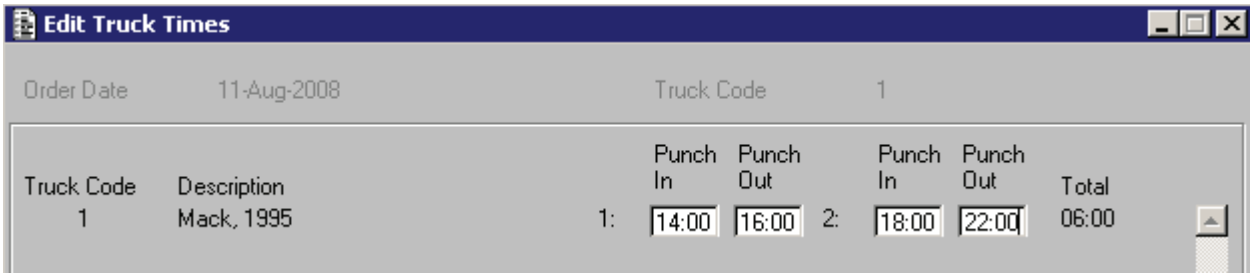
Driver Times and Truck Times

The Driver Times and Truck Times screens are used primarily for editing missing Punch In and Punch Out times for drivers and trucks. A good example of when you might need to edit a time is when an aggregate tractor trailer with mobile signaling breaks down and the driver has to switch over to a rental tractor which does not have mobile signaling to pull his trailer to the job and finish out his day. In this case, the driver would have valid times up to the point where he broke down, and no times showing after that event. You can then enter these missing times in COMMANDseries.

Edit Driver Times (EDTDRVT)



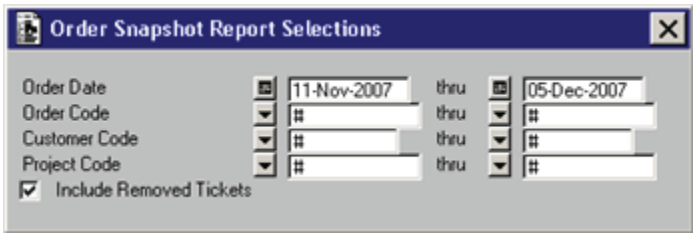
Edit Truck Times (EDTTRKT)



Order Snapshot Report

The Order Snapshot report combines the easy to read timeline of the Graphic Analysis report with the detailed analysis of the Order Analysis report. It is generally run only to review a specific order or group of orders and can show timings such as the time between loads. You can use this report to investigate customer complaints.

Order Snapshot Report Selections (SELOSNP)



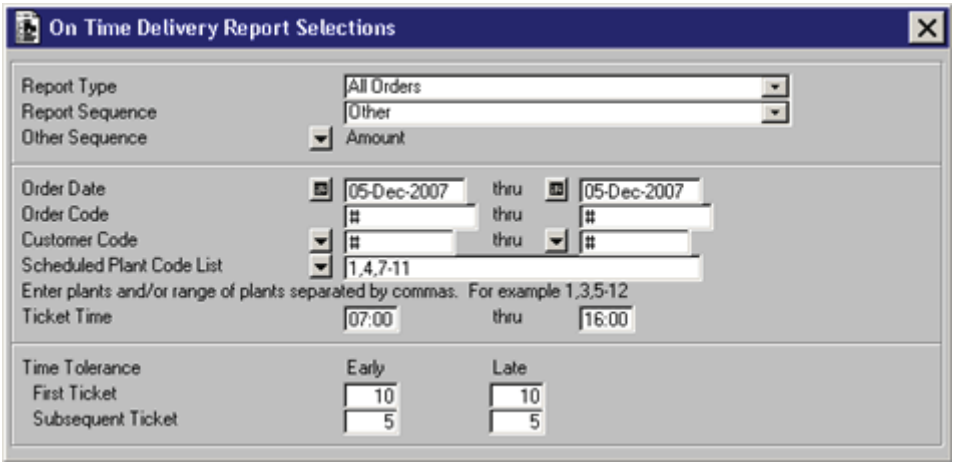
On Time Delivery Report

The On Time Delivery report can be run for a single day or range of days and shows the number and percentage of tickets that were on time. Tickets with missing or invalid times are shown separately so that they don't skew the results.

The On Time Delivery report analyzes delivery records. You specify acceptable margins for error on delivery times, and the system calculates the percentage of orders that fall with those boundaries. Because frequently there are small problems with the first delivery at a site, the report provides one range for first loads and a second range for all subsequent loads.

When orders involve multiple plants, they appear in printed reports only under the first relevant plant. The order will not be printed under each of the involved plants.

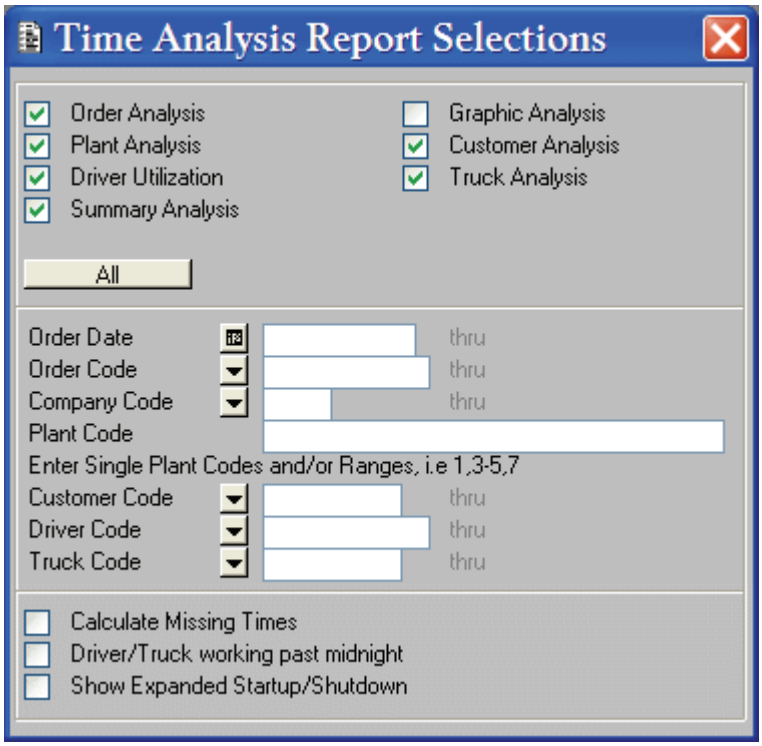
On Time Delivery Report Selections (SELONTM)



Time Analysis Reports

Time Analysis Reports provide valuable management information on delivery efficiency for orders, trucks, drivers, customers, and projects {Dispatch > Time Analysis > Time Analysis Reports}.

Time Analysis Report Selections (SELTIMA)



Time analysis reports are only useful if the recorded ticket times are accurate. Screens for editing ticket, driver, and truck times are available to allow final editing of the times before reports are printed {Dispatch > Time Analysis > Ticket/Driver/Truck Times}.

For each checkbox marked on the selection screen, a separate report page is printed.

Order Analysis Report

The **Order Analysis** report is used to analyze the level of service provided to customers and to examine the level of performance for filling orders. Print it daily, after status times have been edited. The report shows a table of ticket times broken down by category, along with the quantity of delivered product per hour.

Plant Analysis Report

The **Plant Analysis** report gives information on ticket activity at the plant specified including delivered quantity and current truck status for each ticket.

Driver Analysis Report

The **Driver Analysis** report analyzes each driver based on the time they spend in each delivery status, calculating an efficiency rating based on productive time/clock time. You can see the total time spent between each delivery status for drivers, their break time, as well as the total clock time. Analyze every driver who was on the clock by leaving the **Driver Code** field blank, or analyze individual drivers' time by entering that driver's code into the **Driver Code** field.

Select the **Driver/Truck Working Past Midnight** checkbox to display all drivers and trucks that are working past midnight on the Missing Times Report. This field will only display if Driver Analysis is the only report selected.

Select **Show Expanded Startup/Shutdown** if your system has Optimization and you wish to get additional KPI data.

Summary Analysis Report

The **Summary Analysis** report analyzes the delivery activity of one or more plants, specifying the number of loads, trucks, and loads per truck as well as the delivered quantity, average load order quantity, and quantity per truck.

Graphic Analysis Report

The **Graphic Analysis** report presents a timeline of each ticket delivery. Just a quick glance at an order can reveal whether or not the report was delivered in a timely manner.

Customer Analysis Report

The **Customer Analysis** report shows customer activity based on specifications defined on the **Time Analysis Report Selections** screen. This report can help determine if problems in delivery are being caused by a driver or a customer.

Truck Analysis Report

The **Truck Analysis** report is similar to the Driver Analysis Report, save that it measures the efficiency of individual trucks. Companies that move drivers from truck to truck may need to use both Driver and Truck Analysis Reports to get an accurate picture of delivery cycles.

Missing Times Report

Status times for all tickets are stored in the system in most cases; however, if problems arise and the driver or dispatcher has to manually update the status, errors can be made. The Missing Times report identifies tickets with missing or unusual times. Unusual times are defined by the values entered in the **Time Tolerance** fields on the selection screen.

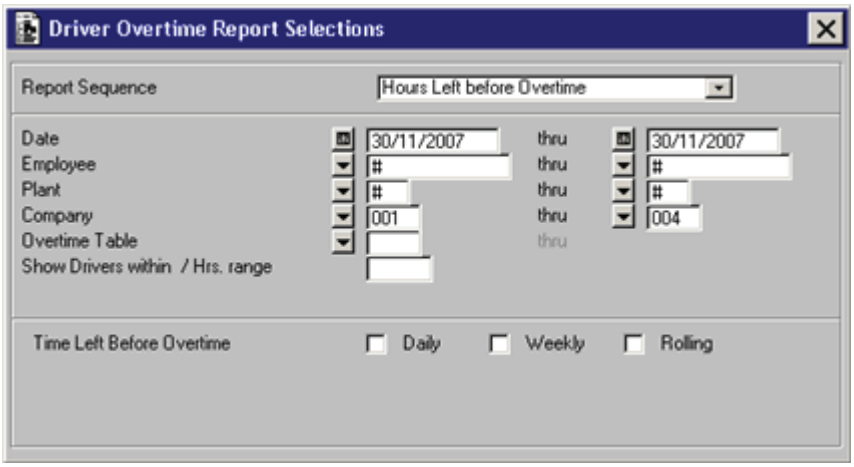
When the **Calculate Missing Times** checkbox is checked, the system calculate approximate missing time values based on existing times and the load schedule. When the **Only Tickets with Missing, Invalid or Out of Tolerance Times** checkbox is checked, only these tickets will appear on the report.

Missing Times Report Selections (SELMIST)

Overtime Report

The Overtime report shows the overtime for each driver for a particular day or range of days, as well as the total overtime hours. The report can be ordered by the hours left before overtime or the driver code and include daily, weekly, or rolling time left before overtime starts.

Overtime Report Selections (SELOVTM)



The report displays Concrete orders when run from COMMANDconcrete, and Aggregate orders when run from COMMANDaggregate.

When run from COMMANDconcrete, the order of the time statuses is:

- Printed
- Load
- End Load
- On Job
- Unload
- End Unload
- Wash
- To Plant

- At Plant

When run from COMMANDaggregate, the order of the time statuses will be:

- Load
- End Load
- Printed
- On Job
- Unload
- End Unload
- Wash
- To Plant
- At Plant

The following options are available for the **Report Sequence**:

- **`Source of Status Update`**
- **`User Name of Status Update`**
- **`Tickets with Multiple Status Updates for a Single Time Status`**

You can further limit the report by opting to have only a range of time statuses selected in the **Time Status** fields.

Payment Option Reports

The **Payment Options** menu {Dispatch > Payment Options > Payment Reports} has a number of options that can be used to generate reports that give information on payments, tickets and receipts.

Topics in this section:

Reconciliation Report

Uncollected Tickets Report

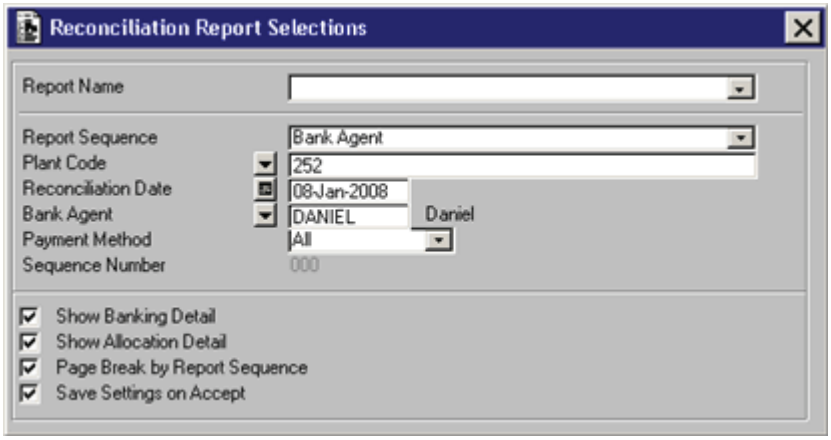
Missing Times Report

Reconciliation Report

The Reconciliation Report lets users select a range of plants and displays information on reconciled records. This is closely linked with the **Cash Reconciliation** {Dispatch > Payment Options > Cash Reconciliation} screen, where payments can be reconciled.

Information is displayed for each plant, sorted by plant code. The exception to this is when the **Report Sequence** is set to **`Bank Agent`**. In this case, information is displayed for each bank agent.

Reconciliation Report Selections (SELCREC)

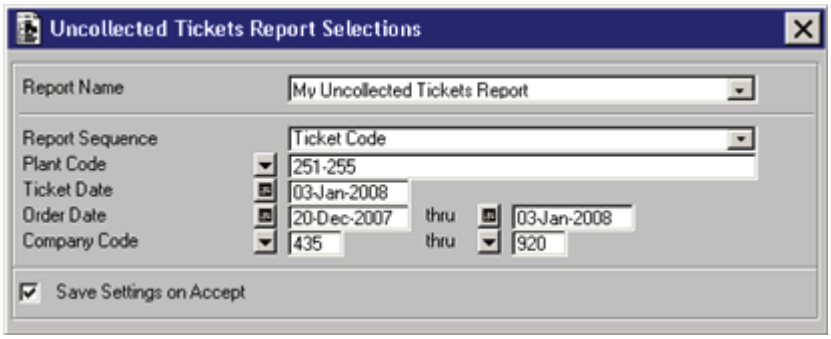


Uncollected Tickets Report

The Uncollected Tickets Report lets users select a range of plants and displays information on uncollected tickets. An uncollected ticket is defined as any ticket where the full amount has not yet been collected. This is determined by comparing the COD Amount in the Ticket file with the sum of the Payment Allocation files for that ticket.

This is closely linked with the **Uncollected COD Tickets** {Dispatch > Payment Options > Uncollected COD Tickets} screen, which displays similar information.

Uncollected Tickets Report Selections (SELUNTK)

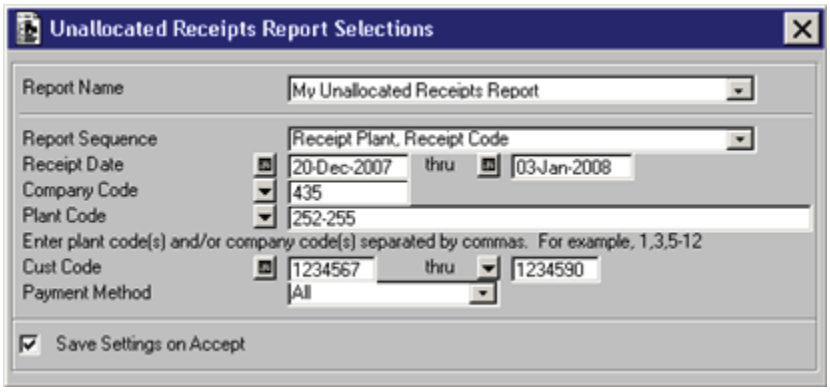


Unallocated Receipts Report

The Unallocated Receipts Report lets users select a range of dates, plants, and customers and displays unallocated receipt information for each plant. Unallocated receipts are defined as those that are not fully allocated and not removed from the system.

This is closely linked with the **Allocate Payments to Tickets** {Dispatch > Payment Options > Allocate Receipts} screen, which allows payments to be allocated to tickets and receipts.

Unallocated Receipts Report Selections (SELUNRC)



Application Management

Each COMMANDseries module has an Applications Management menu, located in the Manage menu. This menu contains options that will assist you in maintaining your system.

The Application Management menu provides access to application-specific management functions used by the COMMANDconcrete and COMMANDaggregate applications. They are performed on an as needed or possibly periodic basis. The forms accessed from the Application Management menu include:

- **Calculate a Price Change**
- **Mix Design Interface - QA**
- **Initialize TESYS Data**
- **Batch Interface Queued Tickets**
- **Batch Code Generator**
- **Edit Project Expiration Dates**
- **Lien Legacy Invoice Manager**
- **Realign Accounts and Cost Centers**
- **Error Log Report**
- **Update Zone Salesman**
- **Update Inactive Customers**

There are multiple purging options in the system, some of which are found in thie menu. All purging options are discussed in a separate section.

Calculate a Price Change

The Calculate Price Change function lets the user issue a general price increase for all products and for project specific products, without having to edit individual products and projects. The price change can be either an increase or decrease in the existing price. An effective date is registered so that current prices stay in effect until the effective date is reached. Also, the effective date allows the price change to be entered and verified in advance of the effective date.

In addition, the price change can be targeted at specific projects. Products affected by the price change can be selected individually, by product category, or by product type.

The system provides a great deal of flexibility. You can make a change as broad as raising the price of all concrete mixes by 5%, or as narrow as changing the price of all aggregate items from a specific plant for a specific project.

All items in the item master file (IMST) are automatically subject to having their prices changed via this routine. In order for a project item to be subject to this routine, the product must have the **Allow Automatic Price Adjustment** checkbox selected. This field is located on the **Products** tab in the Project editor. If, for example, the checkbox is not active

in a given project, then the Calculate Price Change routine will not change the price of any product on the project, even if that specific project is targeted.

There is also an **Allow Automatic Price Adjustment** flag on the **Pricing** tab of the Customers and Projects screens. This flag establishes the default flag setting for all new items added to the customer/project – changing it does not affect existing products in the customer or project record. (Please consult the **Setting Up the System** manual for additional information.)

To calculate a price change:

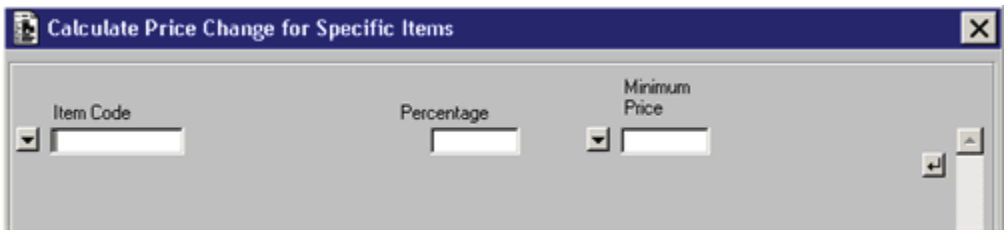
1. Go to the **Calculate Price Change** screen {Manage > Application Management > Calculate Price Change}.

2. Mark the **Change Prices In Items** , and/or **Master Project Products** checkboxes to indicate where price changes are being calculated.

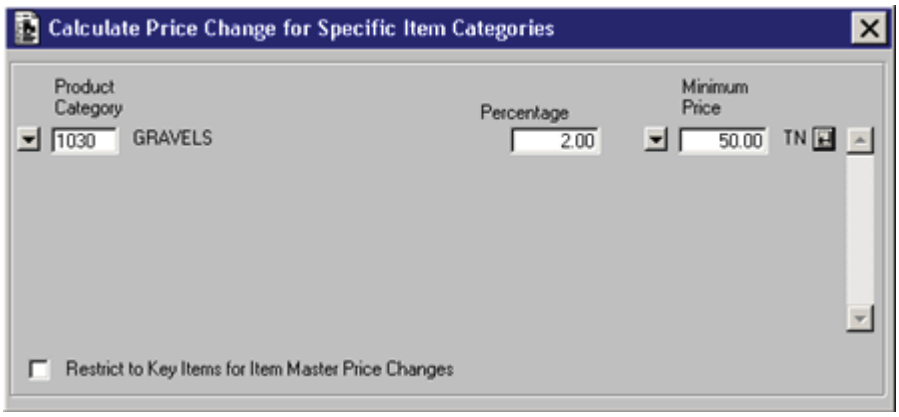
   When **Master Project Products** is selected, the Type Price (set on the Projects > Products tab) will always display on the report. The Material Price will display only if the Type Price on the Projects > Products tab is either **Fixed Material Price** or **Fixed Cartage Delivered Price**, and if the Material Price is not the same as the Delivered Price.
3. Enter the **Effective Date**. For the calendar shortcut, click on the box to the left of the field. Double-click on the date the price change will be effective.
4. Select a method to **Change Price By** in the associated field. Prices can be adjusted by a set amount or by a percentage.
5. Enter ranges for **Customer Code**, **Project Code**, **Location**, **Plant Code**, as needed.

   The availability of these fields is dependent upon the **Change Prices In** selections.
6. Select what to **Change Prices For**. The options are:
   - **Specific**
   - **Specific**
   - **Specific Type**
7. Select the **Items** button to display a price change selection screen. The screen that appears reflects the **Change Prices For** option:

Calculate Price Change for Specific Items (SELPCHG1)



Calculate Price Change for Specific Item Categories



Calculate Price Change for Specific Item Types (SELPCHG3)

Each screen lets the user enter a price change based on an amount or a percentage, based on the **Change Price By** option on the main screen.

All screens except the Specific Type screen allow entry of multiple prices changes through use of the **Add Occurrence** command.

8. Enter the percentage or amount by which you want the price changed. Use negative values to reduce prices.

   Caution: If you are entering an amount, **do not enter a new price!** If you do, that amount will be added to the current price of the item.

9. **Accept** the **Calculate Price Change** screen to calculate the price change information. You will be prompted for a **Print Model**.
10. Once the print model is selected, the system will generate a report showing the effect of the entered price changes. At this point, no prices have been changed. This functionality allows the user to enter prices changes and review the results before making a final decision to apply the changes.
11. When the report has finished printing (or, if reviewing the report on screen, when the report window is closed), a confirmation box will display:
    - **Update** applies the price changes.
    - **Cancel** does not apply the price changes.

Many users will print the price change report and then cancel the process. They then sit down and review the report, making sure that the calculated price changes are acceptable. If they decide to apply the changes, the information can be re-entered and the prices updated.

Mix Design Interface - QA

The **Mix Design Interface** screen lets the user send mix product constituent information to a batching system. After the selection parameters are entered, the user is allowed to edit the list of products to be downloaded. After the user is satisfied with the products to be downloaded, **accept** the screen and the mix product information is downloaded to the batching system.

To use the Mix Design Interface:

1. Go to the **Mix Design Interface** screen {Manage > Application Management > Mix Design Interface}.

2. Select a **Mix Download Method** from the drop-down list. Options are:
   - Download from Item Master
   - Download from Order
   - Upload to Orders
3. Select an **Output to** option from the drop-down list. The options are:
   - Batch Panel Output
   - File Output

   This field will not be available if the selected **Mix Download Method** is **Upload to Orders**.
4. If **File Output** is selected, enter an **Output File** and select a **Document Format Group**.
5. Enter a range of values for **Item Code**, **Plant Code**, and **Item Category**.
6. In the **Mixes with Constituent** field, enter a constituent item code to be used when retrieving mix items. If entered, only mix items that contain the specified constituent item will be retrieved and sent to the batching system.
7. If you wish to delete all mixes from the batch panel at one or more plants, mark the **Clear Mix Files** checkbox for the specific plants.

   WARNING: This function is very dangerous. Selecting this checkbox instructs the system to delete all mixes from the batching system, and they are NOT retrievable.
8. Click **Retrieve**. This will save the products for downloading.
9. **Accept** the **Mix Downloads** screen to send the mix product constituent information to the batching system or to an output file.

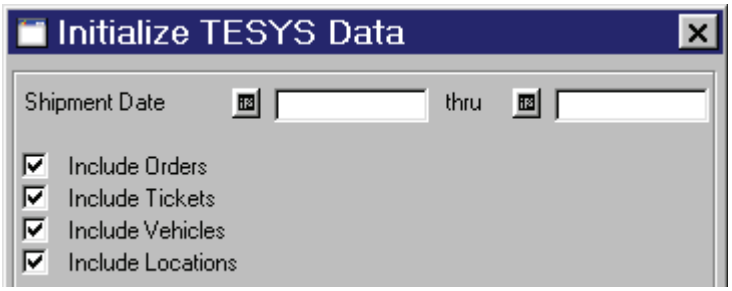
Initialize TESYS Data

If you are licensed for the Inform Interface, this option will appear on your menu. The Inform Interface connects your system with a third-party schedule optimizer. Running this function generates an output file that the Inform Interface then loads into the optimizer.

To initialize TESYS Data:

1. Open the **Initialize TESYS Data** screen {Manage > Application Management > Initialize TESYS Data}.

Initialize TESYS Date screen (DBAIINF)



2. Enter the **Shipment Date**(s) that you want to download.
3. Select the inclusion checkboxes as necessary.
4. **Accept** the screen. The system will generate the download file and close the screen.

For additional information on configuring this option, consult your Inform Interface manual.

Batch Interface Queued Tickets

If COMMANDseries has a direct interface to the batching system, it sends tickets into the batch panel's print queue. As this occurs, the batch panel replies with a success/fail notification message. The Batch Interface Queued Tickets screen shows you the tickets that have been sent to the batch panel, along with their current status.

This screen can be useful in troubleshooting batch communication problems, as it provides direct information as to whether or not a ticket was successfully transmitted,

When weights ar returned fr mo the batch panel, they are immediately updated in COMMANDseries; however, if a ticket is locked during the update, it is lost and not retrieved. To resolve this issue, COMMANDseries will store the locked ticket's weight information ion the **QUBR** (Queue Batch Results) table until the weight can be updated. Once the lock has been removed, the stored ticket weight will be updated as usual.

You can view queued ticket weights on the Batch Interfaced Queued Weights screen via Application Management.

Batch Code Generator

While COMMANDseries allows for an unlimited number of items and mixes, some batch panels, particularly older batch panels, have severe restrictions on the number of batch codes that are supported. The only solution is to reassign batch codes every day, only assigning batch codes to those mixes that will be shipped that day. In this situation, use the **Batch Code Generator** to scan a given day's deliveries, determine how many unique mixes are being shipped, and then assign a unique batch code that can then be entered in the batch computer.

The routine generates a standard COMMANDseries report. The codes listed on the report must be entered into the batch computer manually.

To generate batch codes for a day's deliveries:

1. Go to the **Batch Code Generator** screen {Manage > Application Management > Batch Code Generator}.
2. Enter the **Order Date** for which batch codes are to be generated.
3. Enter an **Batch** number that reflects the maximum number of batch codes to be generated.
4. **Accept** the screen to generate the report.

Edit Project Expiration Dates

The Purge Expired Projects routine uses the Project Expiration Date to identify outdated projects. However, in many cases, expiration dates are not entered when a project is created.

The **Edit Project Expiration Dates** screen lets you edit expiration dates for multiple projects and specific customers. This function provides quick expiration date changes to multiple projects, as opposed to using the Project editor, which retrieves one project at a time.

To edit a project expiration date:

1. Go to the **Edit Project Expiration Dates** screen {Manage > Application Management > Edit Project Expiration Dates}.
2. In the **Customer Code** field, enter the code of the customer whose project expiration date you wish to edit. When you <Tab> out of the field, all projects related to that customer will display on the screen.
3. Enter a new **Expiration Date** for each project as needed. If the field is left blank, the project has no expiration date and is good indefinitely.
4. **Accept** the **Edit Project Expiration Dates** screen to save the new expiration date(s).

Lien Legacy Invoice Manager

COMMANDlien is often bought or installed after other COMMANDseries applications have been up and running for some time. These users need a means of assigning existing invoices to lien locations. The **Lien Legacy Invoice Manager** provides a flexible means for doing this.

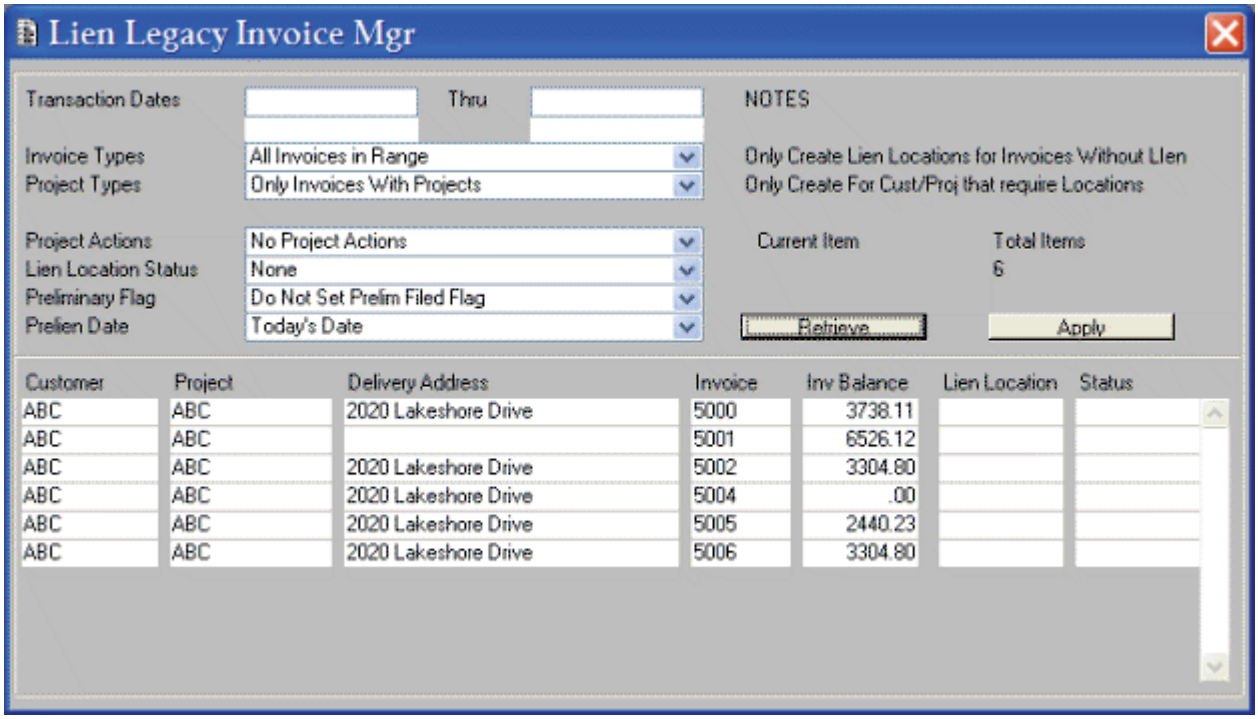
Based on the system configuration and on your selections, the **Lien Legacy Invoice Manager** creates new lien locations and assigns the existing invoices to those locations.

To assign existing invoices to lien locations:

1. Open the **Lien Legacy Invoice Manager** {Manage > Application Management > Lien Legacy Invoice Manager}.
2. Enter the **Transaction Date**(s) that you wish to update.

3. Select the **Invoice Types** you are interested in. You may select all invoices, paid invoices, or open invoices.
4. Using the **Project Types** field, you may select all invoices, or only those invoices that are in a project.
5. The **Project Actions** field lets you specify if the lien location should be made a project default.
6. Use **Lien Location Status** to specify the lien status of the newly created locations. If no status is specified, the status will default to **Open**.
7. Use **Preliminary Flag** to specify whether or not these locations have already gone through the preliminary notice stage.
8. If you are specifying that the locations in question have already been filed for a preliminary notice, then you can use the **Prelien Date** field to specify when these notices were issued.
9. Press **Retrieve**. A list of all invoices that meet your criteria will be displayed.

Lien Legacy Invoice Manager (DBALNLI)



10. **Accept** the screen or press <F2> to create the new lien locations.

Realign Accounts and Cost Centers

This option is used to change existing company, cost center, and account codes. Once the screen containing the new codes is accepted, the system will modify the detail and summary information to reflect the changes.

The **Realign Accounts and Cost Centers** function changes data in many files. It must be run only when no other users are logged in and when all invoicing and G/L postings have been completed. Before using this screen, all possible batches must be posted. Ideally, it is

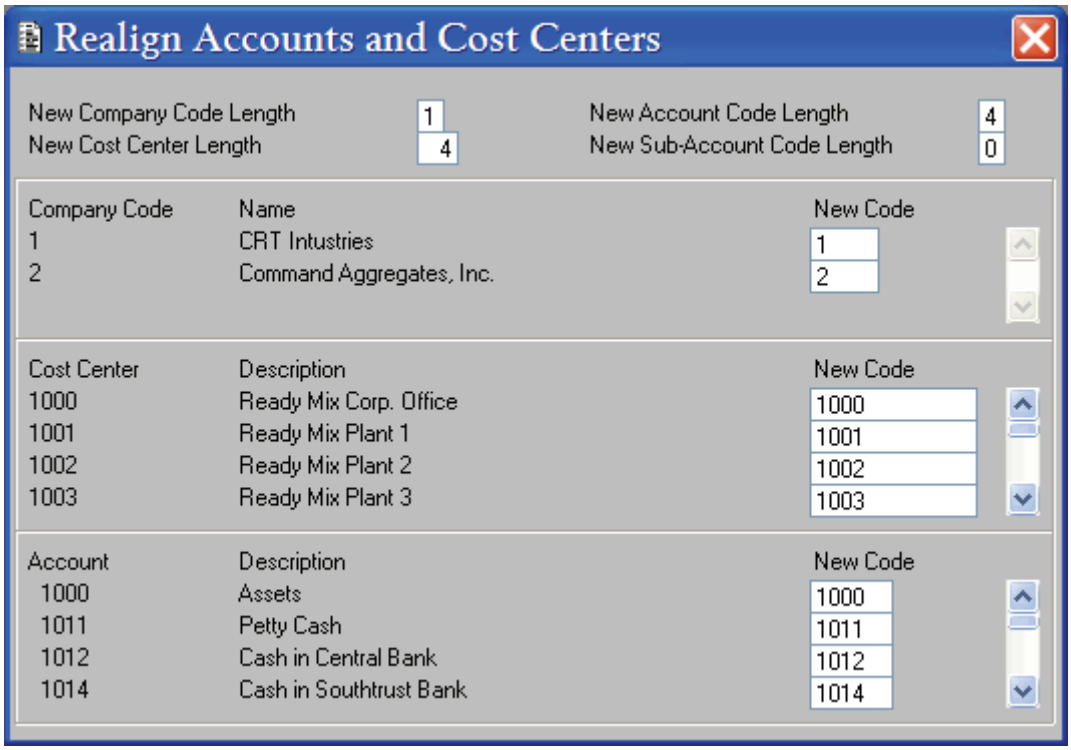
best to make any necessary code changes at the beginning of the fiscal year or at least at the beginning of a month.

Be aware that any changes to the length of the company codes, cost centers, accounts, and/or sub-accounts will be reflected in general ledger data across COMMANDseries applications. If third-party systems are being used, be sure that the appropriate changes are made to make those systems conform to the new codes. In addition, G/L Data Out document formats will need to be updated with the new field lengths.

To realign accounts and cost centers:

1. Go to the **Realign Accounts and Cost Centers** screen {Manage > Application Management > Realign Accounts and Cost Centers}.

Realign Accounts and Cost Centers (DBAREAL)



2. Enter the **New Company Code Length** for the desired length of the company codes used in the system. Because the company code is also the first portion of the cost center code, the **New Cost Center Length** field will recalculate its value when you tab out of this field.
3. If you wish to adjust the length of the cost center codes, enter it in the **New Cost Center Length** field for the desired length of the account codes used in the system.
4. Enter the **New Account Code Length** and **New Sub-Account Code Length** for the length of the account and sub-account codes used in the system.
5. Enter a **New Company Code** to replace an existing company code. By default, the system shows the existing company code.
6. Enter a **New Cost Center Code** to replace an existing cost center code. By default, the system shows the existing cost center code. Use the scroll bar to page through the list.

7. Enter a **New Account Code** to replace an existing account code. By default, the system shows the existing account code. Use the scroll bar to page through the list.
8. **Accept** the **Realign Accounts and Cost Centers** screen.

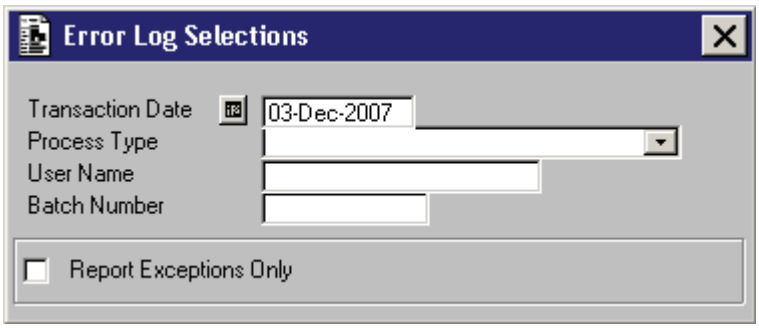
Error Log Report

The **Error Log Report** allows you to create a report that displays the details of the log file for a particular import.

To generate an error log report:

1. Go to the **Error Log Selections** screen {Manage > Application Management > Error Log Report}.

Error Log Selections (SELLOGT))



2. Enter a date to **Transaction Date**.
3. Select an option from the **Process Type** drop-down list. This list is populated with the names of files that have been imported.
4. Enter the **User Name** of the person that performed the import. On an Automated Data In/Out this might be 'Auto Config'.
5. Enter the **Batch Number** of the import that you want to detail in the report.
6. To **Report Exceptions Only,** mark the checkbox.
7. **Accept** the **Error Log Selections** screen.

Update Zone Salesman

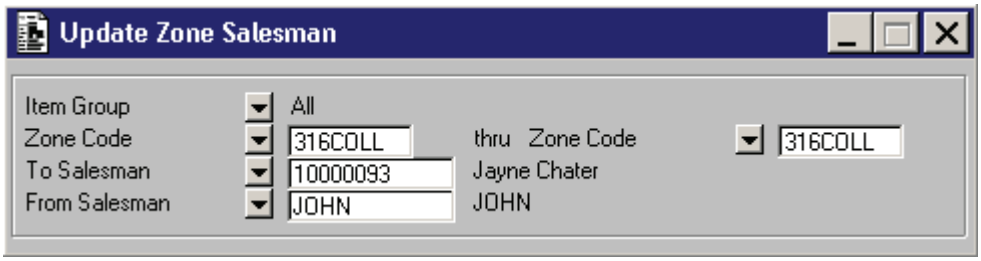
Under each Item Group set up in Configuration, it is possible to define a Zone Salesman. The Update Zone Salesman screen lets you quickly update a number of zone salesman records. A salesman can be assigned to just one or a range of both item groups and zones at once. It is also possible to assign one salesman to all the zone/item group combinations that were assigned to another.

This can be useful when a salesman leaves, or the company undergoes a restructure.

To update a zone salesman:

1. Go to the **Update Zone Salesman** screen {Manage > Application Management > Update Zone Salesman}.

Update Zone Salesman (SELZNSL))

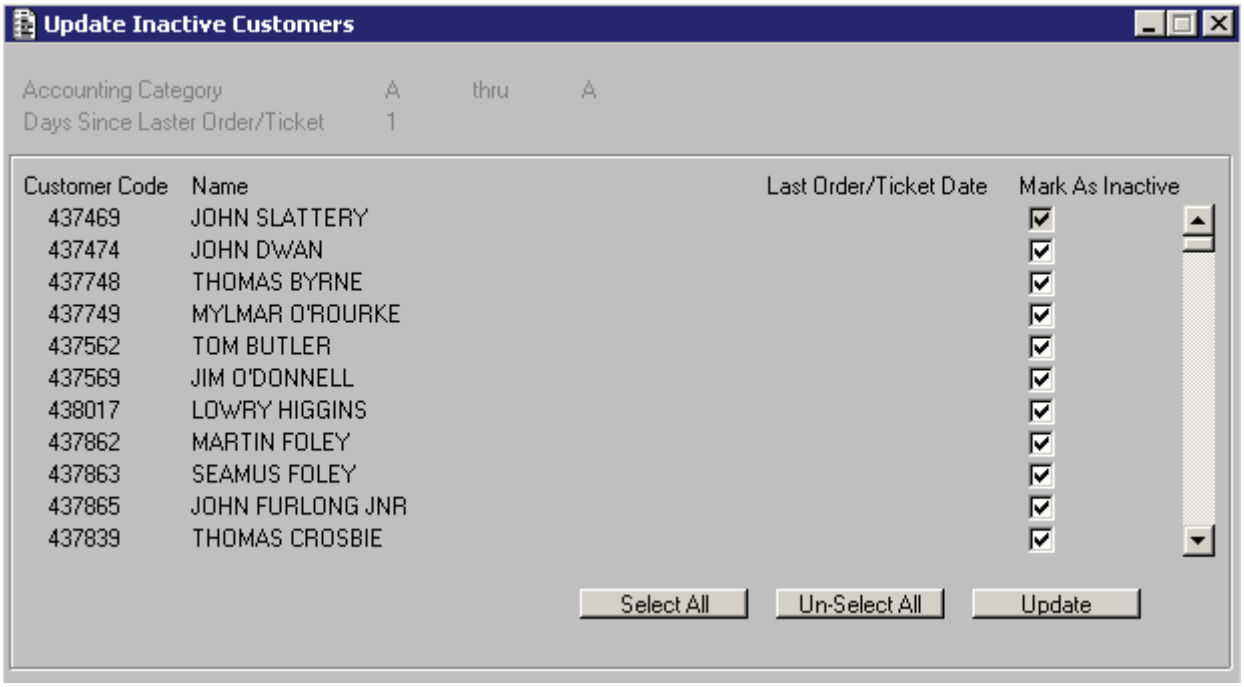


2. Press the detail button on the **Item Group** field to select an item group, or select the **All** button.
3. Enter a **Zone Code** or range of zone codes.
4. In the **To Salesman** field, enter the employee code of the salesman that will now be defined as the salesman for the item group(s) and zone(s) stated.
5. Once a To Salesman has been entered, the **From Salesman** field becomes active. It is not necessary to enter anything in this field. For example, if you want to replace the salesman entered for all item groups in a range of zones, you do not need to enter anything. However, if you want to replace a particular salesman with another, enter the employee code of that salesman in this field.

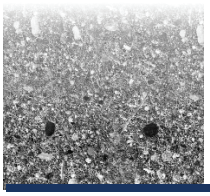
Update Inactive Customers

This form allows you to batch update your customers to an Inactive or an Active status based on their associated **Accounting Category** and the number of **Days Since Last Order/Ticket** for each customer. All orders and tickets for those customers will display once you have tabbed out of the header fields.

Update Inactive Customers (DBAIACU)



The **Mark As Inactive** flag is checked by default for all Customers on this screen, but can be unchecked for any customer who should not be set to an Inactive status. Press the **Update** button to save any changes you make on this screen.



Materials Manager

The Materials Manager offers a number of features that make it easier for concrete companies to maintain and manage mix designs. Companies often have mix designs that number in the hundreds, even thousands–such a large number of mixes can be very difficult to manage.

The Materials Manager is not intended as a mix design tool. Mix designs will continue to be developed by engineers and materials specialists. The Materials Manager provides an efficient means of turning that basic mix design into a salable item within COMMANDseries.

Key Features

- **Yield Management** - Initial mix designs are generally estimates. After field testing, a mix may need modifications. The Materials Manager will help you convert those ratios into a mix design while maintaining proper yield.
- **Constituent Replacement or Blending** - Change material sources, blend materials, or replace a portion of a constituent with another while maintaining a specific yield.
- **Constituent Quantity Altering** - Change the quantity of a constituent up or down by weight or percentage (volume is not maintained).
- **Generic Mix Designs** - Different plants sometimes have different inventory sources, but still need to use the same mix design. The Materials Manager allows you to specify one constituent for one plant, and a different constituent–a different type of sand, for example–at another plant.

The Materials Manager is comprised of several main screens:

- The Materials Manager screen lets you quickly sort through the Item Master file, using a number of different search strings.
- The Mix Design screen lets you proportion a current mix, ensuring that the target yield is achieved. This same screen also allows you to make substitutions of constituents, and to create aggregate blends.

Topics in this section:

Material Manager Setup

Material Manager Screen

Mix Design

Material Manager Setup

There are three major issues to address when setting up the Materials Manager:

- System License
- Lab Location
- Sort Codes
- Item Setup

System License

The system license must contain Material Manager (MM). If your license does not contain Material Manager, contact your Command Alkon sales representative.

Lab Location

A System Lab location must be specified on the Material Manager Configuration screen {Files > General > Configuration > Distribution > Material Manager}. The system lab can either be a dummy plant created solely for that purpose, or can be an existing plant. Mix designs are calulated based on the lab's available constituents; that design then serves as a baseline to be used at the other plants.

Sort Codes

The primary Material Manager screen provides multiple options for sorting and filtering, it is always possible that you will have need an additional sort option. Such a situation can occur when two companies merge, because you will have mixes generated with two sets of naming conventions.

COMMANDseries allows you to create an additional set of sort codes for your mixes. You can have as many codes as you need, but they should all be based on a single measurement. For instance, you might create a set of codes to allows you to sort based on the percentage of air in the mix. So you might have sort codes of 5%, 5.5%, 6%, etc.

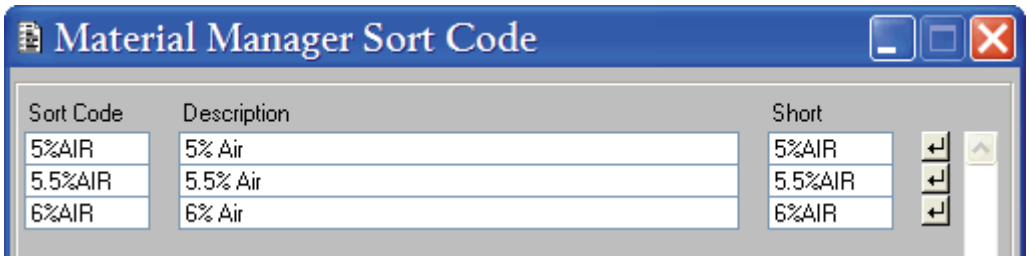
There are two steps in implementing this additional sort code:

- Create the Sort Codes
- Assign a Sort Code to each mix

To create a set of Sort Codes:

1. Open the **Sort Code** screen. {File > Item Information > Materials Manager > Sort Codes}

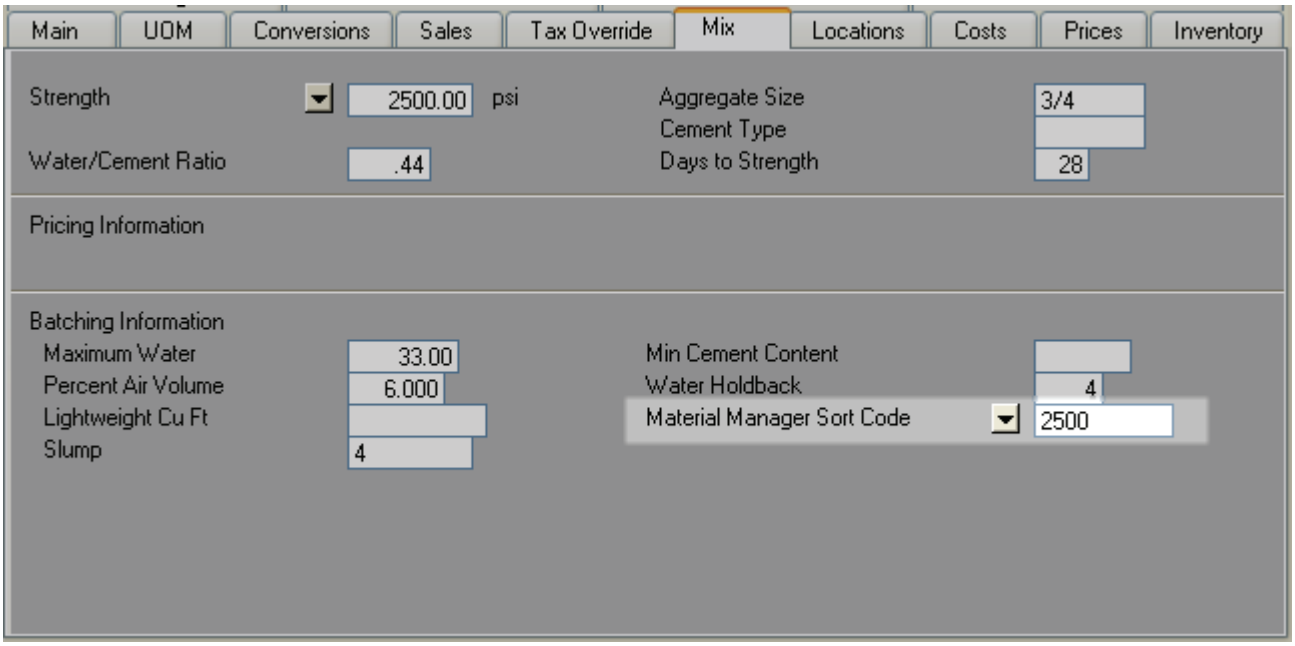
Material Manager Sort Code screen (EDTMMSC)



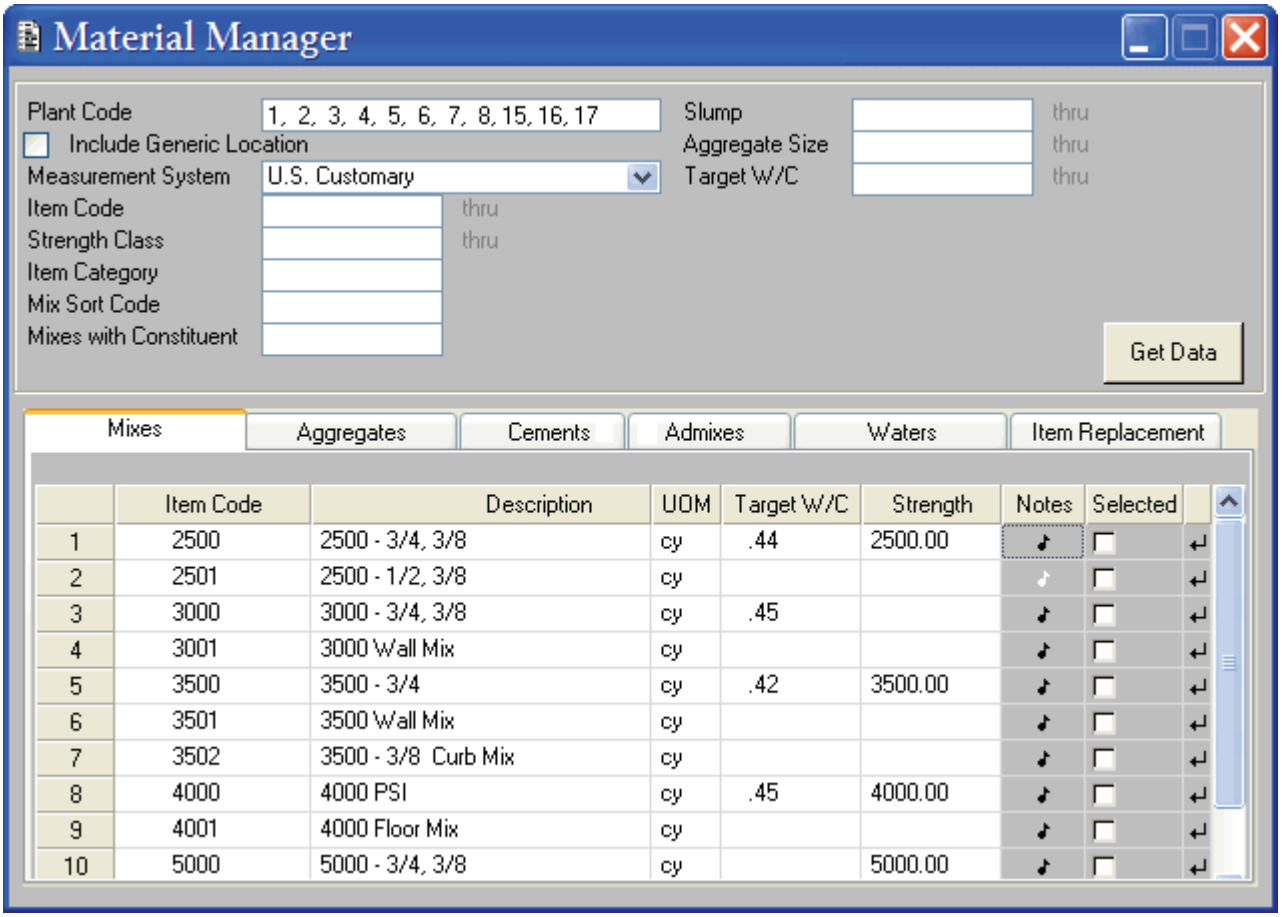
2. Enter a **Sort Code**.
3. Enter a **Description** for the Sort Code.

4. Enter a **Short** code for the Sort Code. This code will be used for reports.
5. Press Add Occurrence to enter an additional code, or accept the screen.

Once the sort codes have been entered, they can be assigned to the individual mixes. This is done by retrieving each mix and entering the sort code on the Items-Mix tab:



Once that is done, you can use the Mix Sort Code as a filtering option on the main Material Manager screen:



Item Setup

Items, both constituents and mixes, must be properly configured.

Constituents

Constituents must be entered into the system correctly for the Materials Manager to operate properly. The most important field for constituents is the **Specific Gravity** field; the system uses that value to convert the weight of a constituent into an equivalent volume, and vice versa, so that the yield of the mix may be accurately calculated.

In addition, the Item Type and Item Category fields can be used for sorting.

Mixes

Material Manager-related fields for mixes are located on multiple tabs.

- Main
  - A mix cannot be loaded into the Material Manager unless the **Allow Constituent Substitution** box is set to True (checked).
- Items-Mix tab.
  - Strength Class

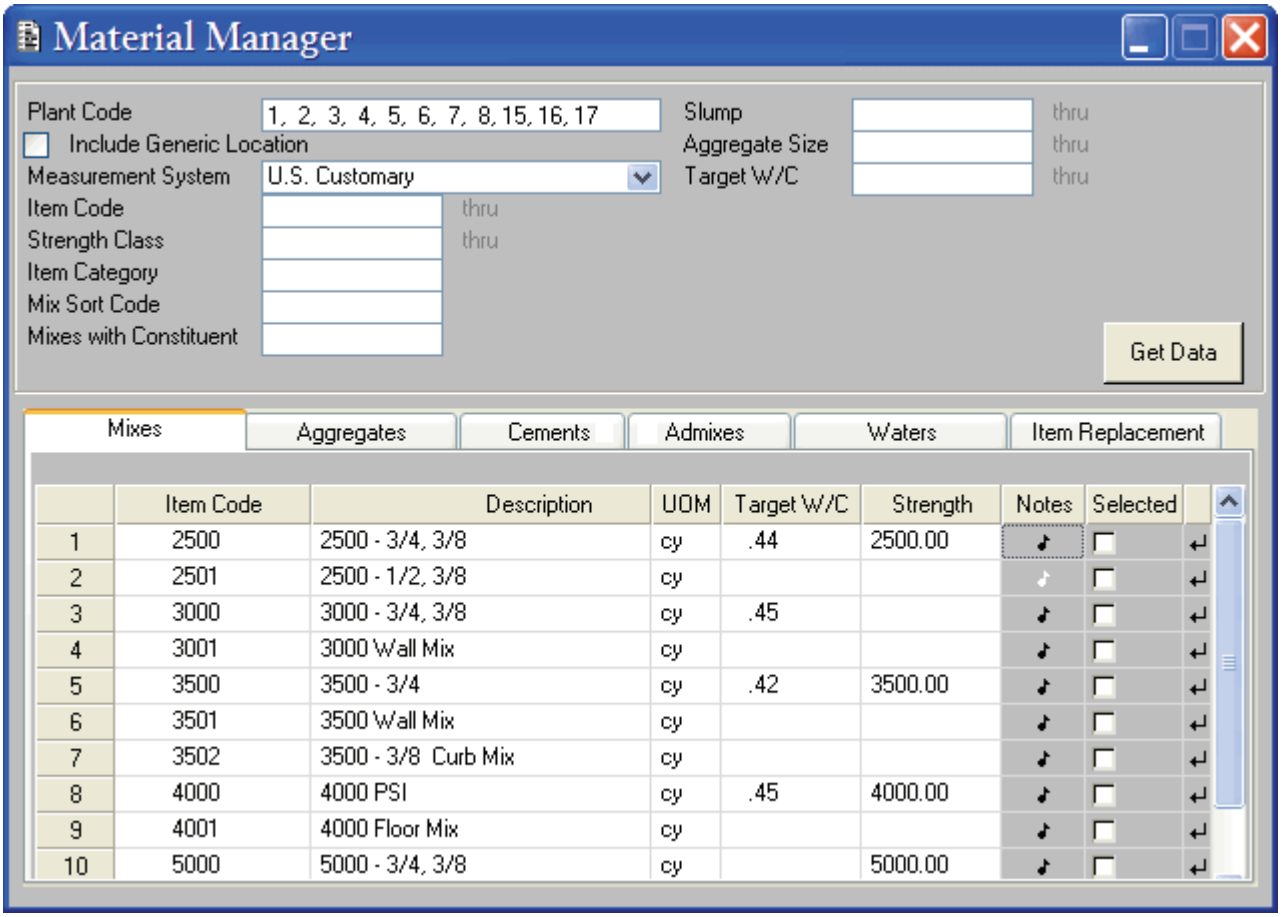
- Water/Cement Ratio
- Aggregate Size
- Slump
- Sort Code (see below)

These fields can be used as search parameters within the Materials Manager to quickly find a specific mix or a group of mixes. All of this information needs to be entered correctly to ensure that the Materials Manager will function properly. For addition information on entering items into the system, please see the **Setting up the System** manual.

Material Manager Screen

The Material Manager screen is used to search for mixes and their constituents. {Files > Item Information > Materials Manager > Materials Manager}

Material Manager screen (EDTMTMG)



Filtering Items

The fields at the top of the screen act as search filters for the various mixes in the system; the results of the search are displayed in the list at the bottom. By default, all plants to which you have permissions default into the **Plant Code** field. This list can be altered as needed.

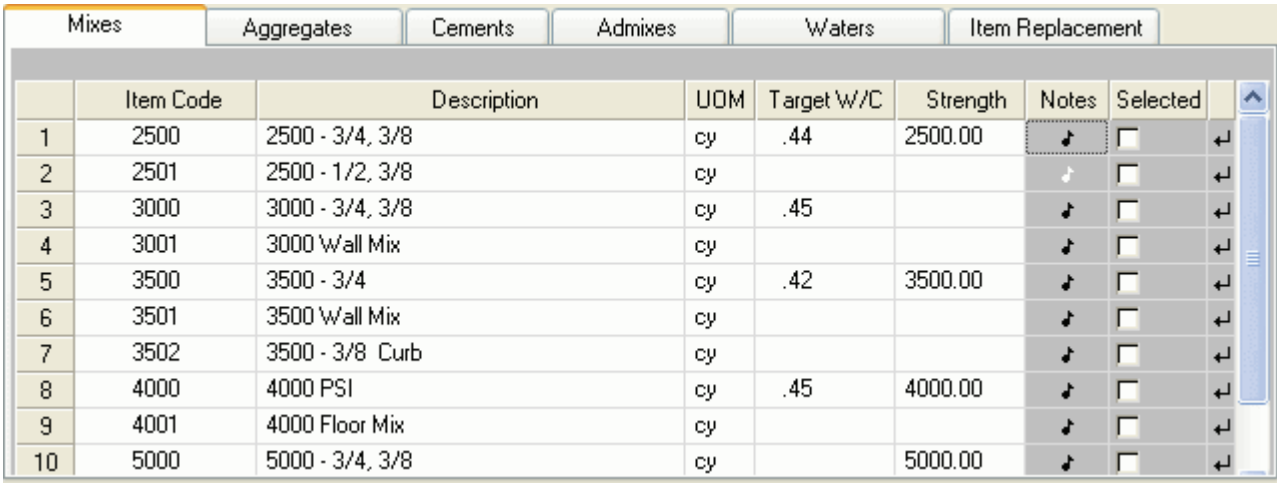
Use a dash to indicate a plant range and commas to delineate single plants (for example, 1, 3-6, 8).

Once the search parameters have been entered, press the **Get Data** button to retrieve the items that match the criteria.

Mixes

The **Mixes** tab lists the mixes available according to the filter parameter settings in the fields at the top of the screen.

Mix tab (EDTMTMG1)



	Item Code	Description	UOM	Target W/C	Strength	Notes	Selected
1	2500	2500 - 3/4, 3/8	cy	.44	2500.00		
2	2501	2500 - 1/2, 3/8	cy				
3	3000	3000 - 3/4, 3/8	cy	.45			
4	3001	3000 Wall Mix	cy				
5	3500	3500 - 3/4	cy	.42	3500.00		
6	3501	3500 Wall Mix	cy				
7	3502	3500 - 3/8 Curb	cy				
8	4000	4000 PSI	cy	.45	4000.00		
9	4001	4000 Floor Mix	cy				
10	5000	5000 - 3/4, 3/8	cy		5000.00		

Use this tab to select the appropriate mix for editing. If the list is too long, you can add additional filters and press the Get Data button again.

The **Notes** column indicates if the mix has an item-level note attached. A black note indicates no note. Double-clicking the note will open a text box in which a note can be viewed (if present), edited, or created.

The **Selected** flag is used to flag a mix as subject to an Item Replacement. If the box is unchecked, that mix will not be affected by a replacement.

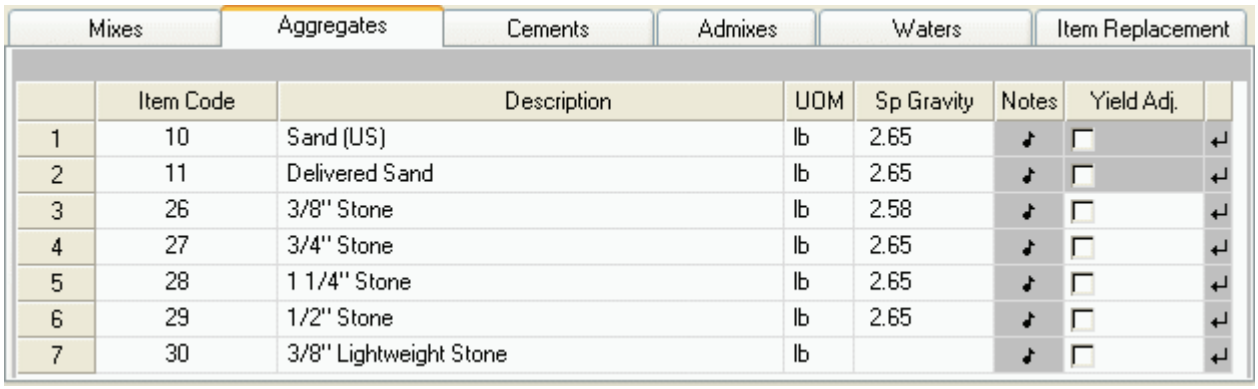
The Add Occurrence button provides ready access to the Item editor. Double-clicking on any add occurrence button will open a blank Item editor–the selected item will not be loaded into the editor.

The list can be sorted by any of the columns, simply by single-clicking on the appropriate column header. Once you have found the specific mix you want to edit, click on the associated line number. The selected mix will be loaded into the **Mix Design** screen (discussed below).

Constituent Tabs

The other tabs on the Material Manager screen – **Aggregates**, **Cements**, **Admixes**, and **Waters** – allow you to access the different constituents in your system. Items are assigned to these tabs based upon their Item Type (not Item Category). The only search filter available for the constituent tabs is the Plant code. The rest of the screen works just like the **Mixes** tab.

Aggregates tab (EDTMTMG2)



	Item Code	Description	UOM	Sp Gravity	Notes	Yield Adj.
1	10	Sand (US)	lb	2.65		
2	11	Delivered Sand	lb	2.65		
3	26	3/8" Stone	lb	2.58		
4	27	3/4" Stone	lb	2.65		
5	28	1 1/4" Stone	lb	2.65		
6	29	1/2" Stone	lb	2.65		
7	30	3/8" Lightweight Stone	lb			

When performing item replacements, the Material Manager uses fine aggregates to make volume adjustments as needed. The Aggregate tab allows you to specify what sand(s) is to be used for compensation. If the **Yield Adj** cell for an aggregate is gray, it is a fine aggregate (based on the item type) and can be used for volume compensation. The cell is white for a coarse aggregate. The Yield Adj checkbox is active only for fine aggregates; it cannot be checked for a coarse aggregate.

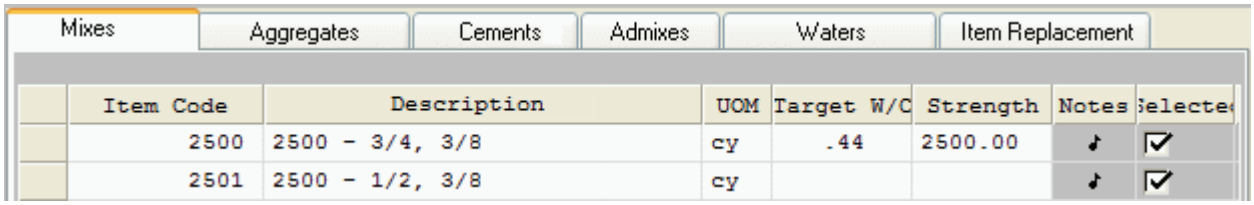
You can use the **Notes** button to record additional information about the constituent, and you can use **Add Occurrence** to access the **Item** editor, where you can edit existing items or create new ones.

Item Replacement

From time to time it can become necessary to modify mixes, either by adjusting the amounts of the different constituents, or, in some cases, by completely replacing one constituent with another. The Materials Manager gives you an efficient means of making these changes across multiple mixes and locations.

To begin the process, enter the desired selection criteria on the Materials Manager screen, and press Get Data. The mixes listed on the screen will be the mixes affected by the Item Replacement routine.

Retrieved Mixes

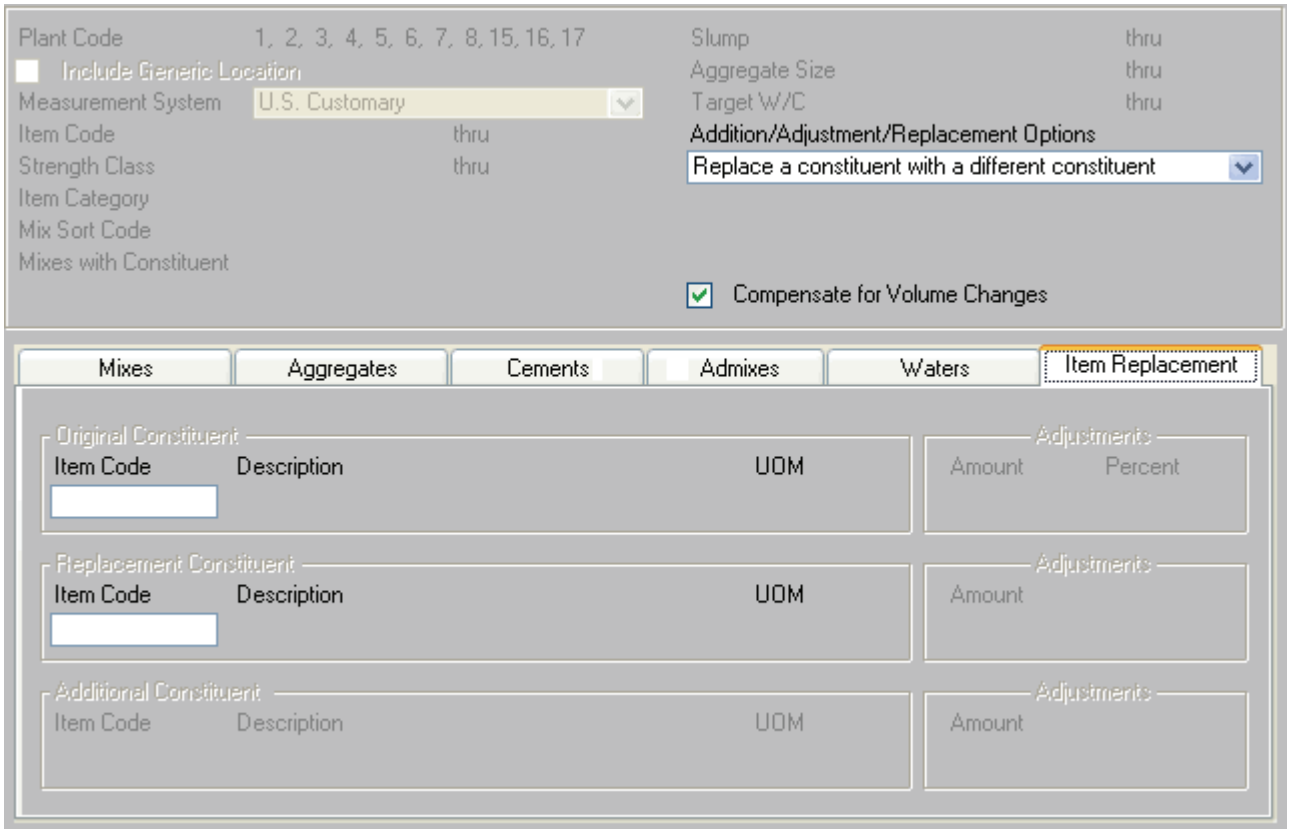


	Item Code	Description	UOM	Target W/C	Strength	Notes	Selecte
	2500	2500 - 3/4, 3/8	cy	.44	2500.00		
	2501	2500 - 1/2, 3/8	cy				

Now, select the **Item Replacement** tab. The system will display an error message if you select the Item Replacement tab before retrieving a list of mixes.

Once the Item Replacement tab is selected, two fields will become active in the top part of the screen.

Material Manager screen (EDTMTMG6)



- The **Addition/Adjustment/Replacement Options** drop-down box allows you to select the specific modification you wish to make. The available options are:
  - Replace a constituent with a different constituent
  - Replace part of a constituent by percentage
  - Adjust a constituent by an amount or percent
  - Add a constituent by an amount
  - Replace part of a constituent by an amount
  - Replace constituent with selected amount of different constituent
  - Remove a constituent

  The basic pattern is the same for all types of replacement–after you configure and accept the screen, the system generates a report showing the you the affects of your proposed change. From there, you can either proceed with the substitution, or cancel the operation.

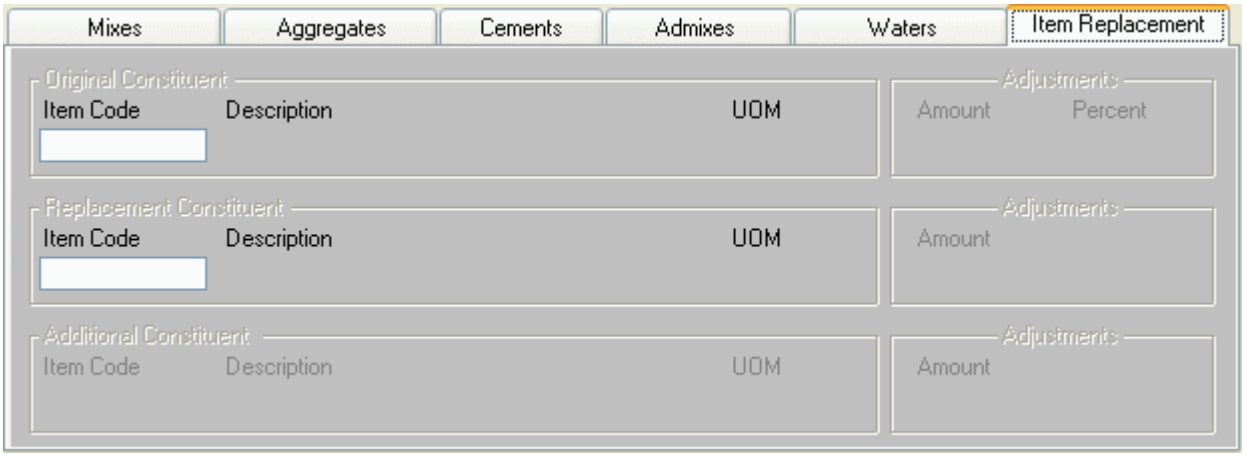
  If a replacement is confirmed and processed, the detail of the replacement are stored in the database, and can be reviewed at a later date.
- The **Compensate for Volume Changes** checkbox allows the system to adjust quantities automatically when replacing one constituent with another constituent with a different specific gravity. The default value for this field is **`True`** – It is highly unlikely that you will ever need to uncheck this box, as doing so can result in improperly proportioned mixes.

Replace One Constituent with Another Constituent

This is the simplest of replacements, substituting one constituent for another. When a location changes its supplier of certain constituents, it may be necessary to replace the constituents.

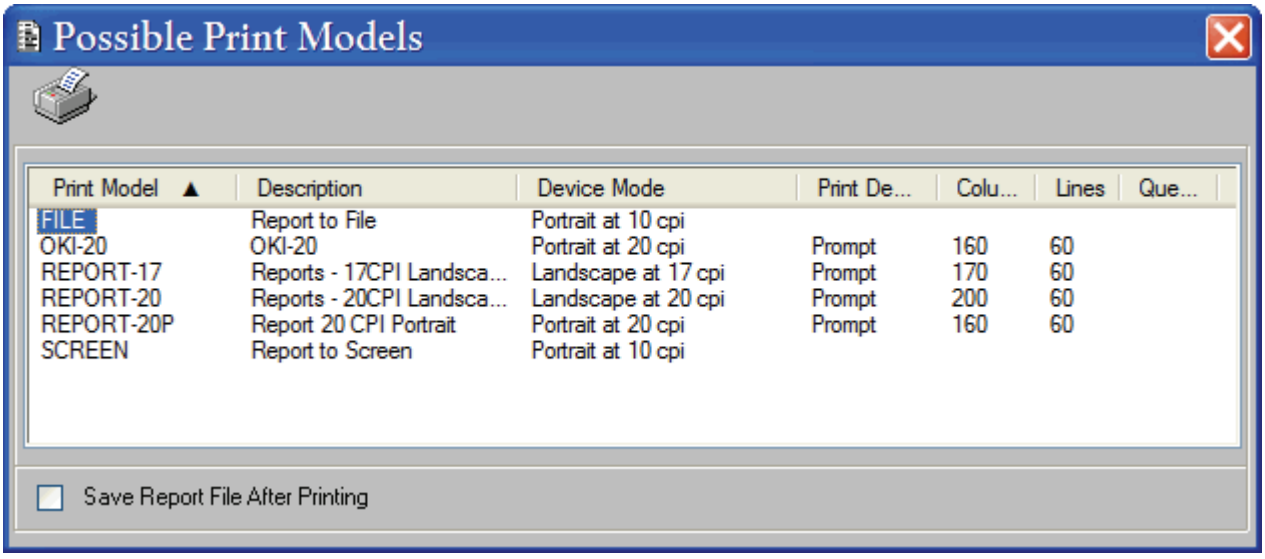
To replace one constituent with another constituent:

1. Select **Replace a constituent with a different constituent** in the **Adjustment/ Replacement Option** field.



2. Enter the **Item Code** for the original constituent.
3. Enter the **Item Code** for the replacement constituent.
4. Accept the screen. Before the system processes the replacement, it will produce a report for your review. Select a print model at the prompt.

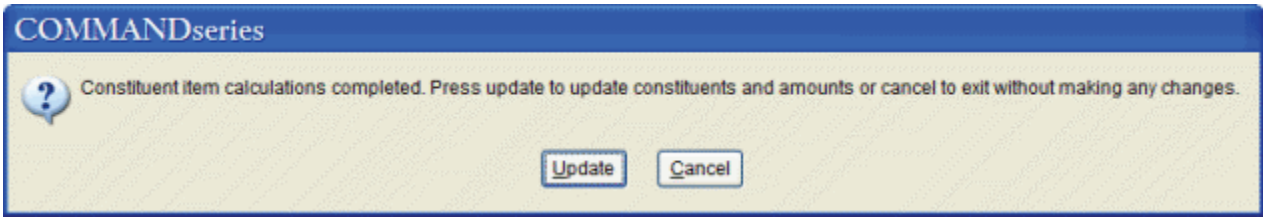
Possible Print Models screen (FNDUPRT)



5. Select a print model and the system will generate a report listing all of the proposed constituent replacements.

6. After generating the report, COMMANDconcrete will prompt you for the disposition of the proposed replacements.

Update prompt


COMMANDseries
Constituent item calculations completed. Press update to update constituents and amounts or cancel to exit without making any changes.
Update
Cancel

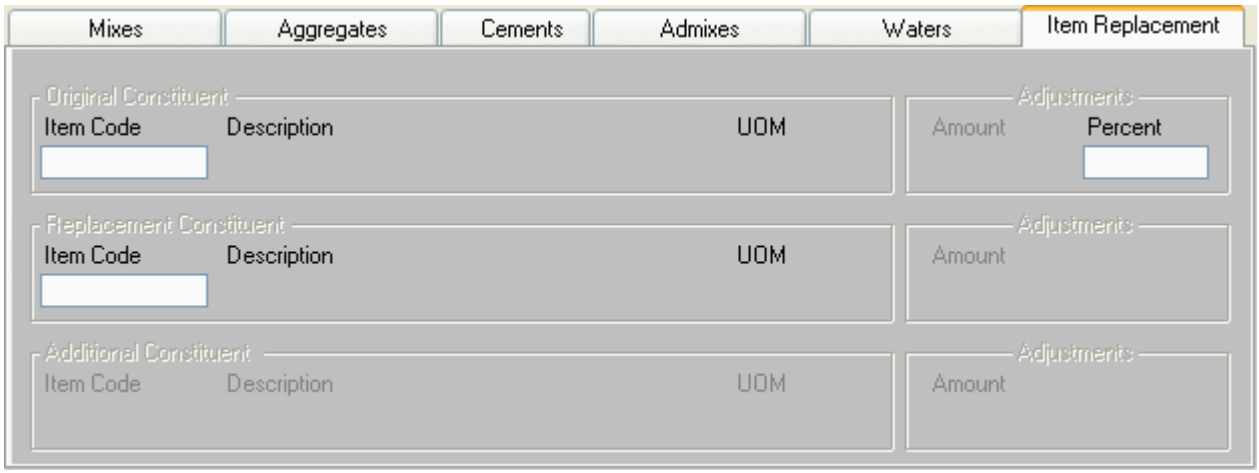
Press **Update** or **Cancel**, as needed.

Replacing a Constituent by Percentage

If you go from stocking a single type of cement to stocking two different types of cement, you may need to adjust your mixes to use a combination of the two cements.

To replace part of a constituent with a percentage (by volume):

1. Select **Replace part of a constituent by percentage** in the **Adjustment/ Replacement Options** field.



2. Enter the **Item Code** of the original constituent.
3. Enter the amount (by Percent) of that constituent that you want to replace. This percentage of material (by volume) will be removed and replaced with a like volume of the replacement constituent. The Materials Manger will compute the quantity of new material needed from the G_s.
4. Enter the **Item Code** for the replacement constituent.
5. Accept the screen.
6. Select a print model for the report.
7. Based on the report, either **Update** or **Cancel** the replacement.

Adjust a Constituent

To adjust the amount of a constituent in the mix:

1. Select **Adjust the amount of a constituent in a mix** in the **Adjustment/ Replacement Options** field.

2. Enter the **Item Code** of the constituent you want to adjust.
3. Enter the adjustment quantity in kg or lbs. Adjustments can be either positive or negative; the system will consider all adjustments positive unless the minus sign is placed in front of the adjustment amount!
4. Accept the screen.
5. Select a print model for the report.
6. Based on the report, either **Update** or **Cancel** the replacement.

Add a Constituent

To add a constituent:

1. Select **Add Constituent** in the **Adjustment/Replacement Options** field.

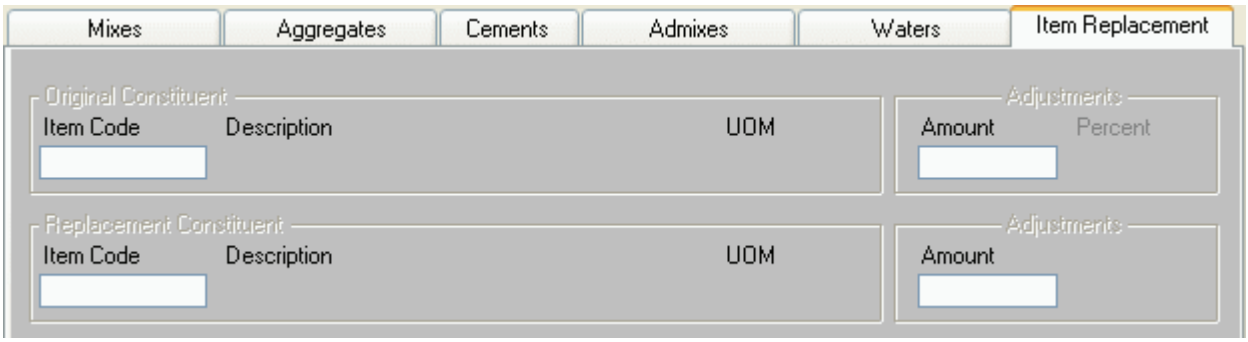
2. Enter the **Item Code** of the constituent you want to add.
3. Accept the screen.
4. Select a print model for the report.

Based on the report, either **Update** or **Cancel** the replacement.

Replace Part of a Constituent by Amount

To replace part of a constituent by amount:

1. Select **Replace part of a constituent by an amount** in the **Adjustment/ Replacement Options** field.



2. Enter the **Item Code** of the original constituent.
3. Enter the amount (by *negative* quantity) of that constituent that you want to replace. quantity of material will be removed and replaced with a like quantity of the replacement constituent.
4. Enter the **Item Code** for the replacement constituent.
5. Enter the replacement amount for the new constituent (this value should be positive).
6. Accept the screen.
7. Select a print model for the report.
8. Based on the report, either **Update** or **Cancel** the replacement.

Replace Constituent with Selected Amount of a Different Constituent

The previous replacement routines operate on a one-for-one basis–that is, a certain percentage or amount of one material is replaced with the same percentage or amount of another material. This option allows you to replace one material with another, allowing you to specify the amount of the new material

To replace a constituent with a selected amount of a different constituent:

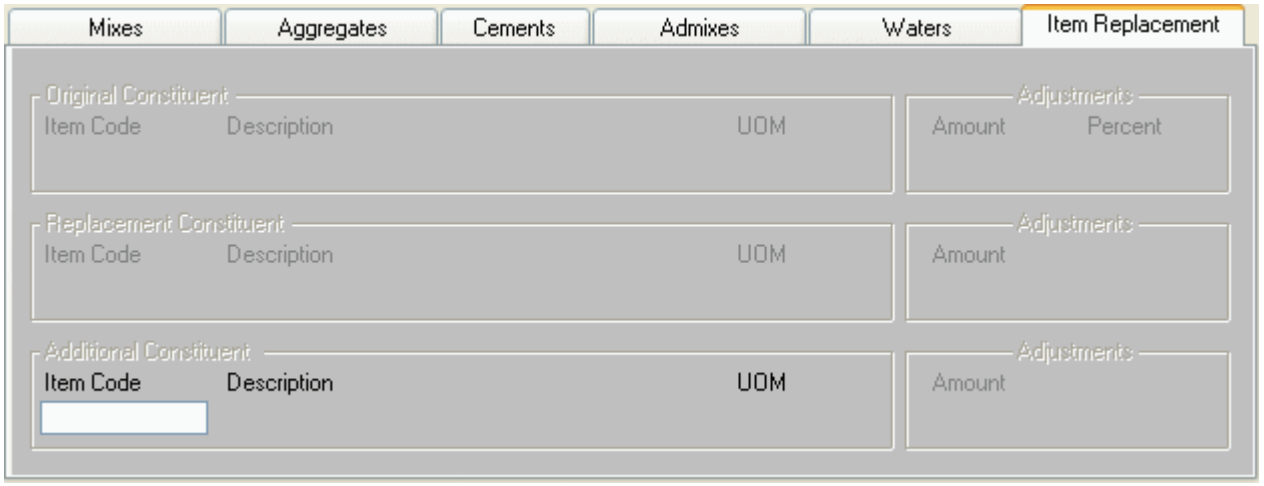
1. Select **Replace constituent with selected amount of different constituent** in the **Adjustment/Replacement Options** field.

2. Enter the **Item Code** of the original constituent.
3. Enter the **Item Code** for the replacement constituent.
4. Enter the replacement **Amount** of the new constituent.
5. Accept the screen.
6. Select a print model for the report.
7. Based on the report, either **Update** or **Cancel** the replacement.

Remove a Constituent

To remove a constituent:

1. Select **Remove Constituent** in the **Adjustment/Replacement Options** field.



2. Enter the **Item Code** of the constituent you want to remove.
3. Accept the screen.
4. Select a print model for the report.
5. Based on the report, either **Update** or **Cancel** the replacement.

Mix Design

The Mix Design screen allows you to modify existing mixes in an environment that lets you verifying the mix proportions. The screen's functionality enables you to make sure that a proper water/cement ratio is maintained, specify the maximum allowable water content, and ensure that the mix will yield a full cubic yard/meter. {Files > Item Information > Material Manager > Mix Design}

When the screen is accepted, the values are written to the Item Master files just as if the changes had been made in the standard Items editor.

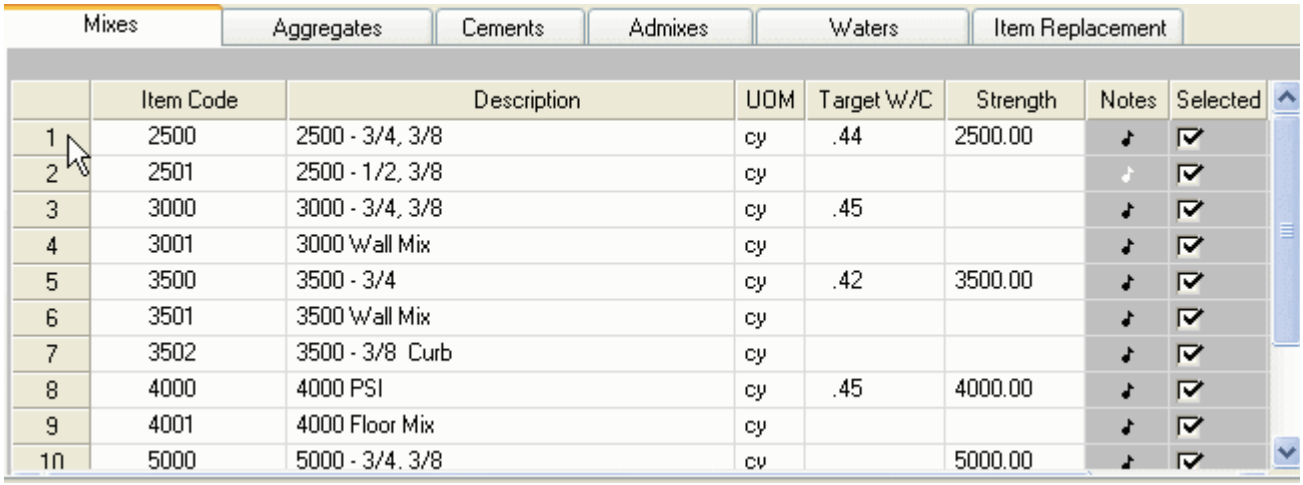
In addition, you can convert a mix design from one location to another, taking into account different constituent availability at the various locations.

To load a mix into the Mix Design Editor:

There are two different ways of loading a mix into the Mix Design Editor:

1. On the Mixes tab of the Material Manager screen, single click the mix's line number.

Loading a mix from the Material Manager screen



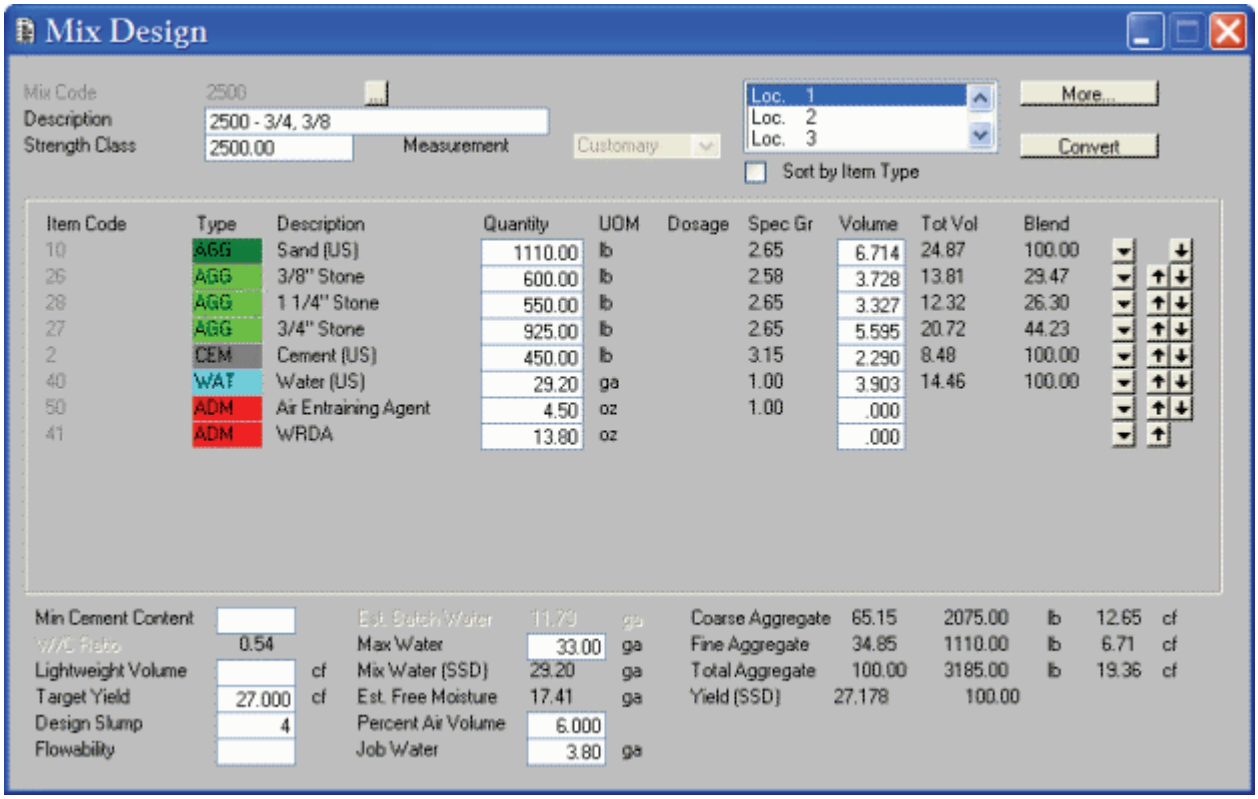
	Item Code	Description	UOM	Target W/C	Strength	Notes	Selected
1	2500	2500 - 3/4, 3/8	cy	.44	2500.00		
2	2501	2500 - 1/2, 3/8	cy				
3	3000	3000 - 3/4, 3/8	cy	.45			
4	3001	3000 Wall Mix	cy				
5	3500	3500 - 3/4	cy	.42	3500.00		
6	3501	3500 Wall Mix	cy				
7	3502	3500 - 3/8 Curb	cy				
8	4000	4000 PSI	cy	.45	4000.00		
9	4001	4000 Floor Mix	cy				
10	5000	5000 - 3/4, 3/8	cy		5000.00		

2. Open the Mix Design editor directly {Files > Item Information >Material Manager > Mix Design} and either enter an existing mix or detail on the Mix Code field to select from a list.

Either method will achieve the same result.

Mix Design Screen Layout

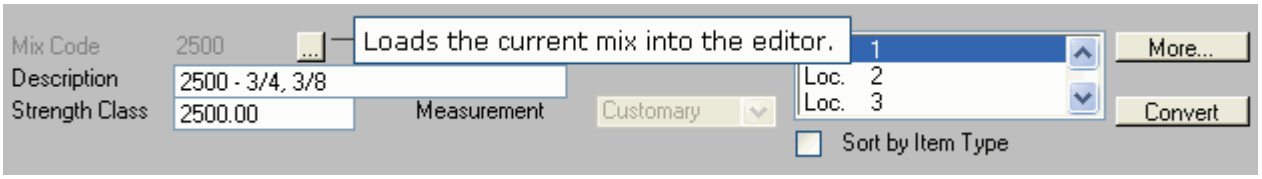
Mix Design screen (EDTMDSN)


Mix Design
Mix Code 2500
Description 2500 - 3/4, 3/8
Strength Class 2500.00
Measurement
Customary
Loc. 1
Loc. 2
Loc. 3
More...
Convert
Sort by Item Type
Item Code Type Description Quantity UOM Dosage Spec Gr Volume Tot Vol Blend
10 AGG Sand (US) 1110.00 lb 2.65 6.714 24.87 100.00
26 AGG 3/8" Stone 600.00 lb 2.58 3.728 13.81 29.47
28 AGG 1 1/4" Stone 550.00 lb 2.65 3.327 12.32 26.30
27 AGG 3/4" Stone 925.00 lb 2.65 5.595 20.72 44.23
2 CEM Cement (US) 450.00 lb 3.15 2.290 8.48 100.00
40 WAT Water (US) 29.20 ga 1.00 3.903 14.46 100.00
50 ADM Air Entraining Agent 4.50 oz 1.00 .000
41 ADM WRDA 13.80 oz .000
Min Cement Content
W/C Ratio 0.54
Lightweight Volume cf
Target Yield 27.000 cf
Design Slump 4
Flowability
Est. Batch Water 11.79 ga
Max Water 33.00 ga
Mix Water (SSD) 29.20 ga
Est. Free Moisture 17.41 ga
Percent Air Volume 6.000
Job Water 3.80 ga
Coarse Aggregate 65.15 2075.00 lb 12.65 cf
Fine Aggregate 34.85 1110.00 lb 6.71 cf
Total Aggregate 100.00 3185.00 lb 19.36 cf
Yield (SSD) 27.178 100.00

The Mix Design screen is broken down into three major areas.

Mix Design screen – Top

Mix Design screen - top (EDTMDSN)

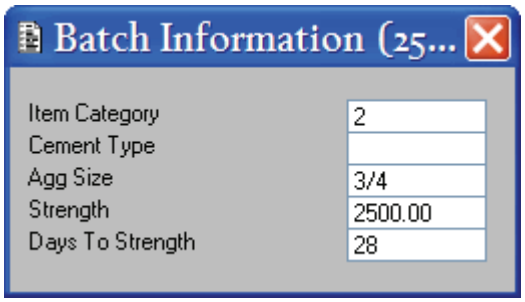


The top area has general information about a mix – mix code, description, location, etc. The button to the right of the Mix Code field loads the current mix into the Items editor so that non-design information, such as pricing, can be added.

There is one important difference between the Mix Design screen and the Item Editor – The Mix Design focuses on individual ICST records instead of the whole IMST record. So the mix design on the screen represents a specific mix design at a single location. The Location selector allows you to select any location at which the mix already exists; once a new location is selected, the appropriate ICST information is displayed.

Pressing the **More** button calls the Batch Information screen, where batch information can be added to the design.

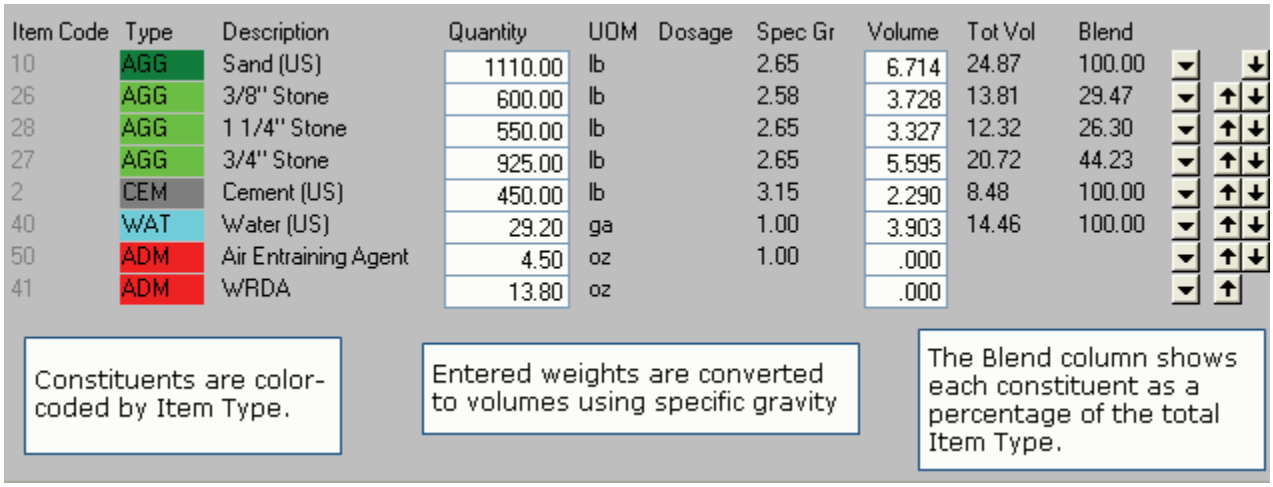
Batch Information screen (EDTBINF)



The Convert button allows you to convert a mix from one location to another.

Mix Design Screen – Middle

Mix Design screen (EDTMDSN)


Item Code Type Description Quantity UOM Dosage Spec Gr Volume Tot Vol Blend
10 AGG Sand (US) 1110.00 lb 2.65 6.714 24.87 100.00
26 AGG 3/8" Stone 600.00 lb 2.58 3.728 13.81 29.47
28 AGG 1 1/4" Stone 550.00 lb 2.65 3.327 12.32 26.30
27 AGG 3/4" Stone 925.00 lb 2.65 5.595 20.72 44.23
2 CEM Cement (US) 450.00 lb 3.15 2.290 8.48 100.00
40 WAT Water (US) 29.20 ga 1.00 3.903 14.46 100.00
50 ADM Air Entraining Agent 4.50 oz 1.00 .000
41 ADM WRDA 13.80 oz .000
Constituents are color-coded by Item Type.
Entered weights are converted to volumes using specific gravity
The Blend column shows each constituent as a percentage of the total Item Type.

The middle section is where the constituents are added and adjusted. By default, constituents are sorted by item type–they are also color-coded by item type:

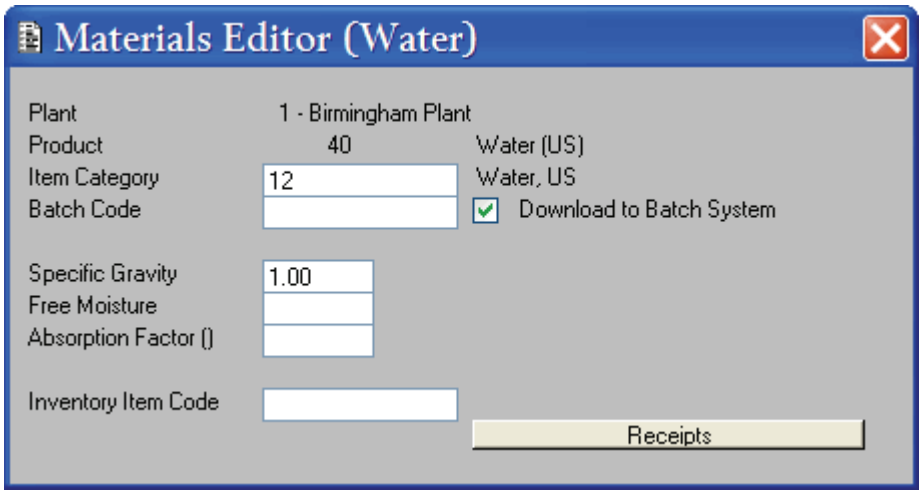
- **Blue** – Water
- **Gray** – Cement/Cementitious Material
- **Light Green** – Coarse Aggregate
- **Dark Green** – Fine Aggregate
- **Red** – Admixture

If the **Sort by Item Type** flag at the top of the screen is deselected, the constituents will be displayed in their order within the ICST table. This order will be used as the batch order for the mix. Up and down arrow buttons can be used to rearrange the constituent order.

The arrow buttons will not display if the Sort by Item Type flag is enabled.

The detail button on the constituent line brings up the Materials Editor screen. This screen allows you to edit mix and batch related information about the specific item. This screen would most commonly be used to provide missing item information, particularly the item's specific gravity.

Materials Editor screen (EDTMTLS)



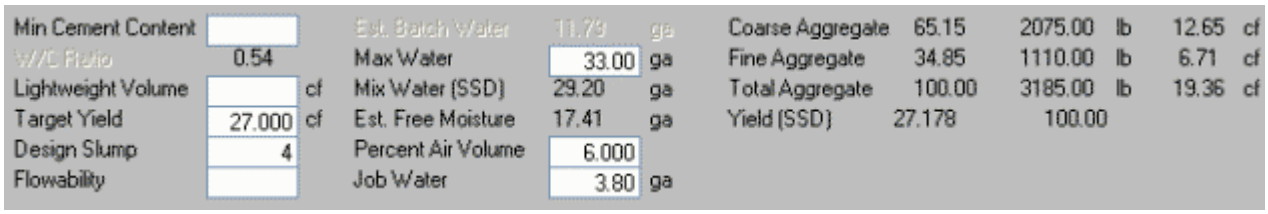
Free Moisture – The moisture available beyond the surface saturated density (SSD) amount. This moisture does not affect the mix design, but will require adjustments during batching, either manually or with moisture sensors.

Absorption Factor (%) – This field is not currently used; functionality for this field will be added in future releases.

If you are using COMMANDinventory, the **Receipts** button will bring up information relating to the most recent material receipts for this item. That information may be useful in determing the specific product, supplier, and/or specific gravity.

Mix Design Screen – Bottom

Mix Design screen - bottom (EDTMDSN)


Min Cement Content
W/C Ratio 0.54
Lightweight Volume cf
Target Yield 27.000 cf
Design Slump 4
Flowability
Est. Batch Water 11.79 ga
Max Water 33.00 ga
Mix Water (SSD) 29.20 ga
Est. Free Moisture 17.41 ga
Percent Air Volume 6.000
Job Water 3.80 ga
Coarse Aggregate 65.15 2075.00 lb 12.65 cf
Fine Aggregate 34.85 1110.00 lb 6.71 cf
Total Aggregate 100.00 3185.00 lb 19.36 cf
Yield (SSD) 27.178 100.00

The fields in the lower part of the screen allow you to check the validity of the mix as well as provide additional information about the mix for both batchers and drivers. The live fields are optional, and are for reference purposes only.

Min Cement Content – A value entered here will give a batcher some guidance if manual adjustments of batch weights are necessary.

Est. Batch Water – The system will automatically calculate the water content of the mix's non-water constituents (based on SSD moisture content), and subtract that from the specified amount of the water constituents. The result is the estimated amount of water that should be added during batching

W/C Ratio – displays the ratio as calculated from the current mix design. If the initial design has to be modified, this field can serve as a reference to ensure that changes do not unduly affect the strength of the mix.

Max Water – The maximum amount of water that can be in the mix without compromising the mix's strength. This value does not affect the calculated W/C ratio on this screen. This value can be entered manually, or it can be calculated when a Job Water value is entered. **Caution:** Setting this value greater than the **Mix Water** value can compromise the mix design.

Lightweight Volume – If the mix contains an item that is so porous that it is impractical to calculate a volume from the weight, the volume can be manually entered here. **Note:** When the lightweight material is entered into the Item Master list, it will need to be given a specific gravity of zero.

Mix Water (SSD) – displays the total amount of non-SSD water in the mix. This value is derived from the **Est. Free Moisture** content of all constituents and the **Est. Batch Water**.

Target Yield – Enter the desired yield.

Est. Free Moisture – Enter the estimated amount of free moisture.

Design Slump – The Materials Manager screen can search for mixes based on the slump. This field can be printed on delivery tickets.

Percent Air Volume– Enter the percentage of air to be incorporated for the mix. The system will multiply the percentage by the **Target Yield** (not **Yield (SSD)**) to determine the volume of air in the mix. Don't forget to enter a value for non-air-entrained mixes, as some air is naturally entrapped during mixing.

Flowability – This is a non-functioning field and is scheduled to be removed frmo the form.

Job Water – The difference between Max Water and the quantity of water in the mix, used to show the amount of water to be added on the job site. This value can be entered manually, or it can be calculated when a Max Water value is entered.

Job Water does not represent an automatic holdback amount. Holdbacks are controlled directly from the batch computer, and the holdback amount should be subtracted from the Mix Water value.

In addition to the above fields, totals (by weight and volume) are provided for coarse and fine aggregates. In addition the percentage of coarse and fine aggregate weights in the aggregate weight total is also supplied.

Yield (SSD) – displays the yield of the current design, based on SSD (Saturated Surface Dry) values. This field will be updated as constituents values are changed.

Using a Generic Mix

Many companies face the problem of having plants that acquire their constituent inventory from different sources. As a result, one plant may have ¾" aggregate with a specific gravity of 2.68, while another plant might have the same aggregate with a specific gravity of 2.74.

The Materials Manager can accommodate these situations through the use of generic mixes. A base mix design can be entered, and then adjusted as needed at each plant.

In order to use this feature, you will need to create a dummy location and plant to act as a lab in which to create the generic mixes. Creating the generic mix in a virtual plant prevents the generic mix from accidentally being sold or batched. Depending on your circumstances,

you may also need to set up generic items for use in generic mix designs. A generic mix does not have to contain only generic items; it can be composed of a combination of specific and generic constituents.

When creating generic constituents, make sure that they are available only at the generic plant.

To create a generic mix:

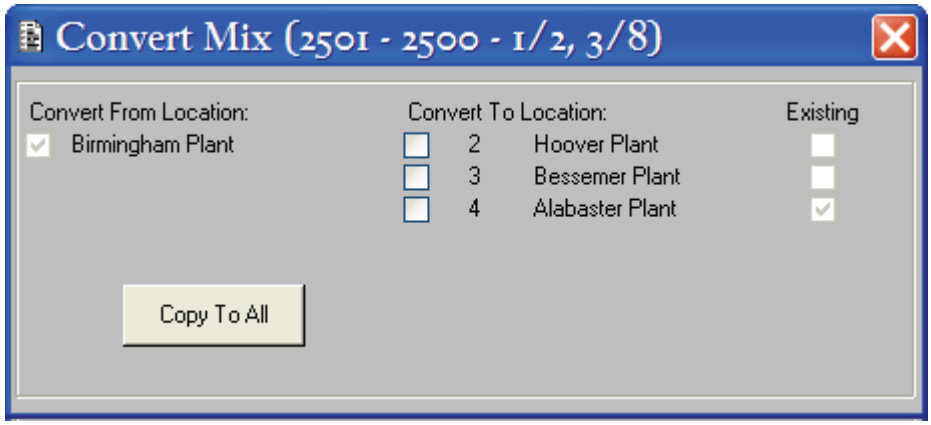
1. In the Mix Design screen, enter a **Mix Code**. This code will become the Item Code.
2. Enter a **Description** of the mix.
3. As soon as you <Tab> out of the Description field, a box will appear. Select your Generic plant (in this example, "LAB") and accept the screen.
4. Set up the mix design as you normally would.
5. Accept the screen to save the new mix design.

A generic mix can then be used as a template with which a similar mix can be created at specific locations. Similarly, any mix that exists at one location can be copied to other locations. The Materials Manager will adjust the new mix designs to accommodate differences in the available constituents.

To copy a generic mix to a plant:

1. In the Mix Design screen, retrieve a mix that exists in the lab plant.
2. If the mix already exists at multiple locations, make sure that the lab plant location is selected in the Location scroll box.
3. Select the Convert button. The Convert Mix screen will display.

Convert Mix screen (EDTCNVT)

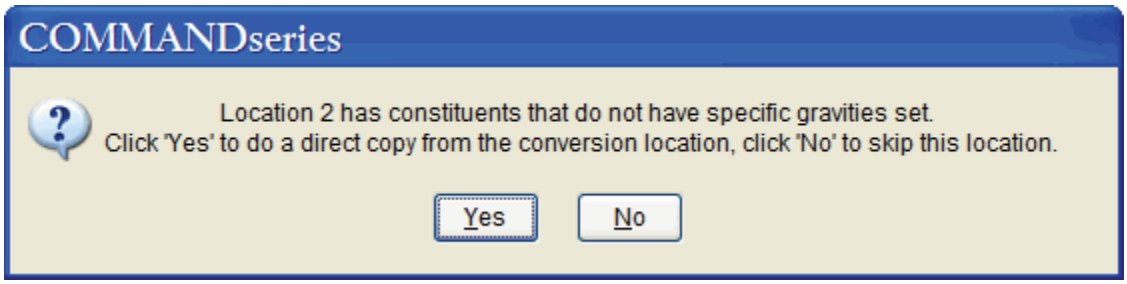


The screen will show the **Convert From Location** and the available **Convert To Locations** (any location linked to a concrete plant). In addition, the **Existing** checkbox indicates locations at which the mix already exists.

4. Select the locations to which you wish to copy the mix. Use the **Copy To All** button to quickly select all available locations.
5. Accept the screen to initiate the copy. The system will validate the available constituents at each location.

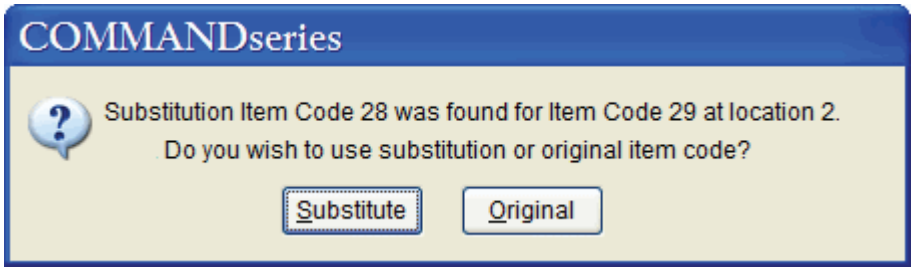
If there is a problem with a constituent, such as missing information, the system will display a warning, giving you the option to skip that location or do a direct copy from the conversion location, using that locations' data:

Conversion Warning


COMMANDseries
Location 2 has constituents that do not have specific gravities set.
Click 'Yes' to do a direct copy from the conversion location, click 'No' to skip this location.
Yes
No

The system will also notify you if item substitutions are in place at a target location:

Substitution Warning


COMMANDseries
Substitution Item Code 28 was found for Item Code 29 at location 2.
Do you wish to use substitution or original item code?
Substitute
Original

6. When the conversion is complete, you will be returned to the Mix Design screen. You can confirm that the conversion took place by confirming that all of the target locations are now included in the Locations scroll box.

Item Substitution

The Item Substitution feature {Files > Item Information > Materials Manager > Item Substitution} assigns a constituent at a production location as a substitution for a constituent at the Lab plant.

Once a substitution rule is in place, if a mix design using the lab constituent is converted to another plant, the system will automatically substitute the constituents (you will be prompted to confirm the substitution.

It does not alter the batch weights, even if the specific gravities of the two constituents are different. To maintain volume, use the item conversion feature.

To assign a substitute constituent for a generic one at specific plants:

1. Open the Item Substitution screen. {File > Item Information > Materials Manager > Item Substitution}
2. Enter an **Item Code** from the lab location or detail on the field to select from a list.

The screen will display the **System Lab Location**, along with the **Specific Gravity** and **Moisture Percent** values for the selected item at the lab location.

3. Enter a **Location Code** for which you want to enter a substitution.
4. Enter the **Item Code** that will be substituted for the generic constituent.

   The specific gravity and moisture percent for the item/location will be displayed. These are live fields, and if a value is changed, it will be written back to the Item Master when the screen is accepted.
5. Use the Add Occurrence command to enter additional substitution rules.
6. Accept the screen.
7. Select a print model for the report.
8. Based on the report, either **Update** or **Cancel** the replacement.

To review or edit the existing substitution rules for a given lab constituent, open the Item substitution screen and enter the constituent's Item Code:

existing substitution rules

Substitution rules can be added, removed, or edited using standard screen commands.

Constituent Replacement Log

Whenever a replacement is performed, the system generates a report prior to the actual change, allowing you to review the impact of the proposed change. If the proposed change is accepted, the details are stored to the database, providing a change history for future review.

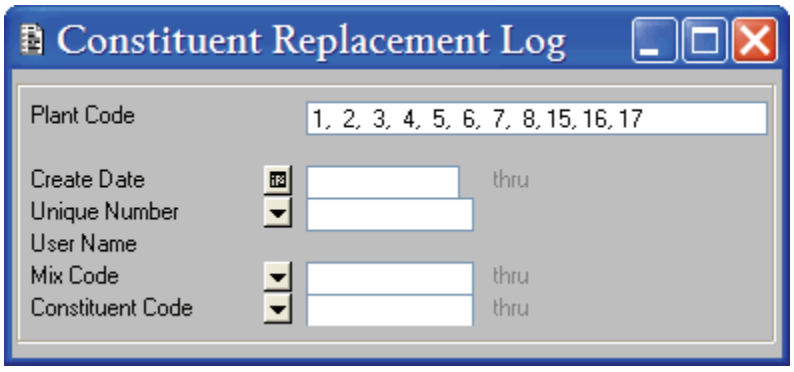
Log data is stored in the Material Manager Transaction Log Header (MMHD) and Material Manager Transaction Log Detail (MMDT) tables.

Note: Changes made on the Item Substitution screen are not stored in the log.

To run a Constituent Replacement Log:

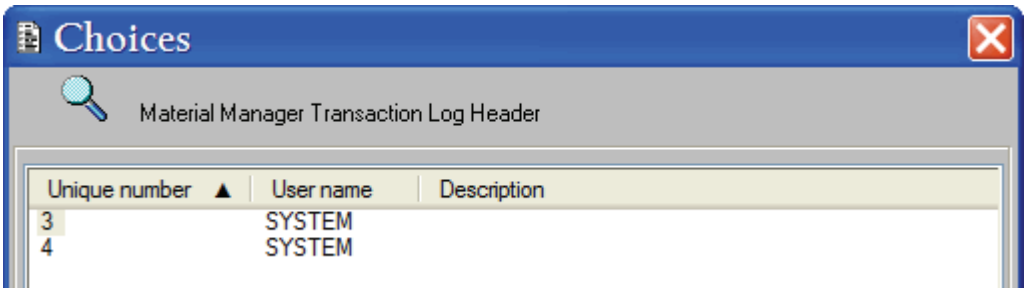
1. Open the **Constituent Replacement Log** screen. {File > Item Information > Materials Manager > Constituent Replacement Log}

Constituent Replacement Log screen (SELMTMG)



2. The **Plant Code** field will default to all plants to which you have privileges. Enter a plant (or plants) as needed.
3. Enter a **Create Date** (or date range) to restrict the log lookup.
4. Each replacement transaction is assigned it a **Unique Number** to serve as a primary key. This number serves much the same as an order code or transaction batch number. Detail on the field to get a list of all replacement transactions that occurred during the specified date (range).

list of replacements (note the unique number)



Double-click on the desired log to pull that transaction into the selection screen.

Accepting the screen at this point will run a report listing all replacements made within the transaction.

5. If desired, enter a **Mix Code** or range of codes to narrow the scope of the report.
6. If desired, enter a **Constituent Code** or range of codes to narrow the scope of the report.
7. Accept the screen to run the report.

Data Management

COMMANDseries provides a number of tools to allow you to work more efficiently with the database. While these tools give you greater ability to manipulate the database, they also give you greater ability to damage the database. Use these tools with extreme care.

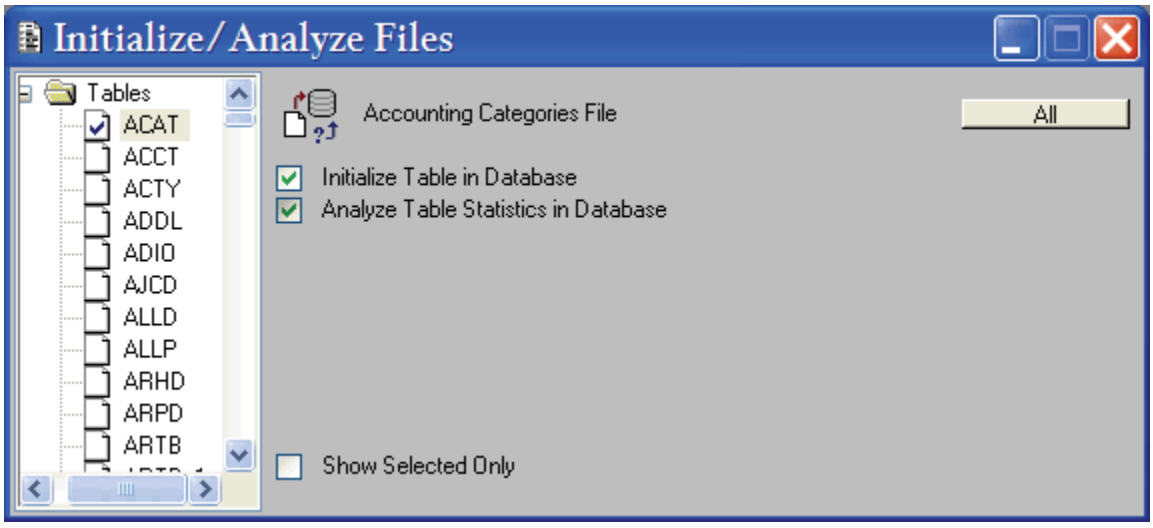
Topics in this section:

Initialize/Analyze Files
Import Data
Export Data
Automated Data In/Out
Import Orders & Tickets
Export Orders & Tickets
Data Maintenance
Automatic Database Updates
Manual Database Updates SQL Worksheet
Database Locks
Service Control
Comm Manager Console

Initialize/Analyze Files

COMMANDseries provides a number of database functions that can be used for troubleshooting purposes. Two of these are found on the Initialize/Analyze Files screen {Manage > Data Management > Initialize Analyze Files}.

Initialize/Analyze Files screen (DBAINIT)



Using the screen is simple. Select the table(s) and the desired function(s), and then accept the screen.

These routines run automatically the first time COMMANDseries is started after an upgrade; the same routines can also be run manually (see Database Updates). However, the routines as run from Database Updates run on a pre-determined set of tables. Running the routine manually allows you to select any table(s) in the database.

Initialize Tables in the Database

This function examines the selected table(s), validating that the structure matches the structure COMMANDseries expects (the COMMANDseries "schema")—number of columns, columns formatted correctly, etc. If a mismatch is discovered, the table will be restructured to conform to the current version of COMMANDseries.

After the table(s) has been restructured, the routine writes and deletes a dummy record to test that all fields are working correctly. In some cases, a database error can result in a table being "stuck" due to an error writing to the table. The writing/deleting of the dummy record has the effect of resetting the table.

During this process, record locks are initiated on the specified table(s). Because of the potential risk to object resource allocation, users should not use Database Update initialization during business hours--there's a good chance that the resulting record locks will further disrupt business. If it must be done, however, initializing a single table at a time will minimize the chance that other work will be disrupted.

Analyze Table Statistics in Database

Note: This routine applies only to Oracle databases.

COMMANDseries maintains a number of database indexes that are used to speed data retrieval. Similarly, the Oracle database engine maintains f metadata on each database schema. The metadata is roughly equivalent to a library's catalog, recording the tables' organization and number of tables. This information is used by Oracle to optimize all database access functions.

As the database grows and changes over time, the metadata becomes outdated, which can have an adverse affect on database performance.

The Analyze Table Statistics function refreshes the Oracle metadata.

The primary worktables are analyzed every time the database is upgraded; however, other tables, particularly the Master Files, are not included in the automatic process. It is probably a good idea to perform periodically a full analysis of all tables, particularly for larger databases, or databases involved in replication.

Nothing will display on screen to indicate the progress of the routine, nor will the updated statistics display.

Import Data

COMMANDseries lets you import existing COMMANDseries data files. You can restore your database by importing all files, importing a customer file, etc.

This function can only import files that were exported from COMMANDseries using the related Export Data function, or files that have been formatted to conform to COMMANDseries database standards. This routine cannot be used to import order/ticket records, or other records exported using a document format.

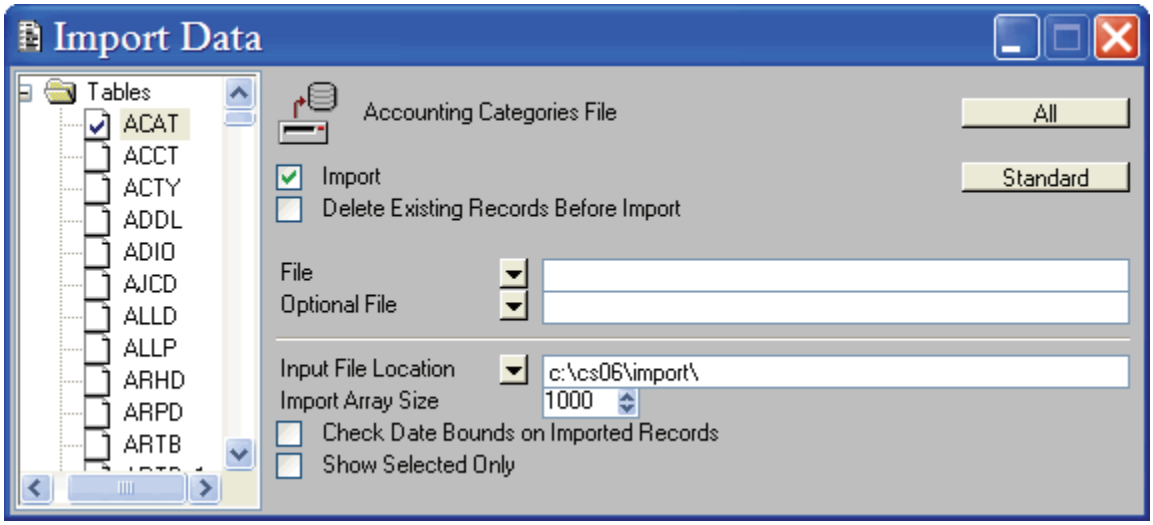
It is best to use the four-letter table name for the file name, with the extension **.TXT** (example: **CUST.TXT**); otherwise, you will have to specify a file name for each file you are importing.

When importing files using any Data In process (manual or automated), the system will truncate any information that is over the maximum field length specified in the database instead of throwing an error. For example, if a maximum field length in the database is 40 characters and there are 45 characters worth of information in that field, the last 5 characters will not go through the import process. In addition, the system will eliminate any leading spaces in fields so more information can go through the import process.

To import files:

1. Place the import files on the server.
2. Select {Manage > Data Management > Import Data.}

Import Data screen (DBAIMPR)



3. Scroll through the table list on the left side of the screen and double-click on the table(s) you wish to import.

   -or-

   - Select a table you wish to import and select the **Import** checkbox.
   - To select all tables, select the **All** button.
   - To select only the standard tables, select the **Standard** button. The standard are a group of tables that contain basic system information.

   The following are the standard tables:

CWHD **CWLN**	COMMANDwriter data—These two tables contain layout information used in generating reports and file listings.
DOCT	Document tags

UOMS	Standard UOM file
UOMC	UOM conversions file
USGE	Usages

These files are maintained in the **\CMDSERIE\IMPORT** folder. If any of these files are corrupted, or if a COMMANDseries service pack updates these files, they can be quickly imported by selecting the **Standard** button.

4. If necessary, select the **Delete Existing Records Before Import** checkbox. If this box is selected, the existing table will be dropped from the database prior to import and rebuilt with the imported data. If this box is not selected, the imported table will be added to the existing table. If duplicate records are encountered, data from the imported table will overwrite existing data.
5. If the file name is not the standard table name, enter the name in the **File** field, or detail on the field to locate the file.
6. If necessary, use the **Optional File** field to specify another file for importation.
7. Enter the location of the import file(s) in the **Input File Location** field, or detail on the field to specify the location.
8. The **Import Array Size** field determines how many records the system attempts to load at a single time. This specifies, in effect, how much of the import file the system bites off at a time.

   The default of **1000** lets the system process large files quickly and efficiently. However, the drawback of the large array size is that if the system encounters an error in processing an import array, the entire array is discarded and the system moves to the next chunk of data. If you are consistently encountering errors while importing data, reduce the size of the array. The reduction will not only ensure that more of the data is imported, but it will help you identify the record that is causing the problem.
9. Select the **Check Date Bounds on Imported Records** checkbox if the data being imported was generated on a pre-Y2K system. The system will check for invalid data records, and give you the option of correcting the date entries during the import process.
10. Check the **Show Selected Only** checkbox to restrict the tables being displayed to the left to only those tables that have been selected.
11. **Accept** the screen to begin the import process. A progress bar will indicate the system's progress.

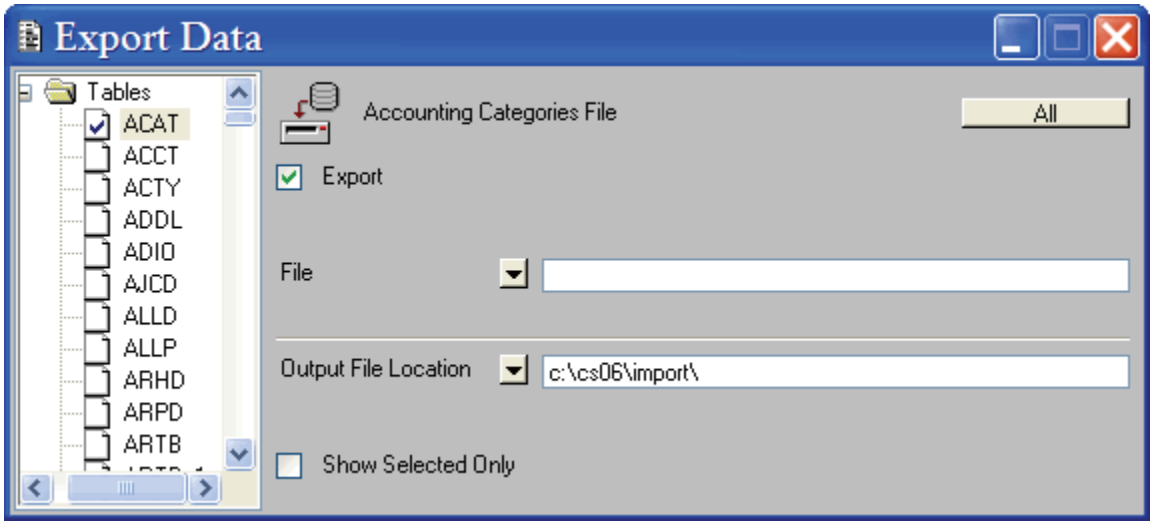
Export Data

COMMANDseries lets you export data files. The export files are text files that conform to COMMANDseries standards. As a general rule, these files are not suitable for importing into a third-party program.

To export files:

1. Open the Export Data screen {Manage > Data Management > Export Data}.

Export Data screen (DBAEXPR)



2. Scroll through the table list on the left side of the screen and double-click on the table(s) you wish to import.
   -or-
   Select a table you wish to import and select the **Export** checkbox.

   If you want to export all tables, select the **All** button.
3. Enter a **File** name if necessary. If this field is left blank, the file name will be the table name, with the extension **.TXT**.
4. The default location of the export file(s) defaults in the **Output File Location** field; detail on the field to specify a different location.
5. Check the **Show Selected Only** checkbox to restrict the tables being displayed to the left to only those tables that have been selected.
6. **Accept** the screen to begin the export process. A progress bar will indicate the system's progress.

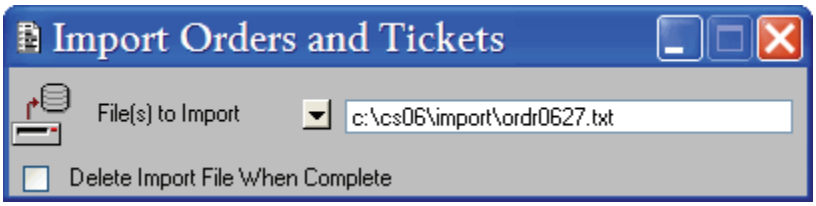
Import Orders & Tickets

Use the Import Orders & Tickets function to load orders and tickets taken at a remote site into the primary system for invoicing. The function loads order/ticket files that have been created using the COMMANDseries **Export Orders & Tickets** function.

To import orders & tickets:

1. Open the Import Orders & Tickets screen {Manage > Data Management > Import Orders & Tickets}.

Import Orders & Tickets (DBAIMOR)



2. The **File(s) to Import** field will initially default from settings in your Assignment file. The default file name will be based on the previous day's date. Enter a file path and name if necessary, or detail on the field to browse your system for the import file.
3. Select the **Delete Import File When Complete** checkbox, if necessary.
4. **Accept** the screen. A progress bar will indicate the status of the import process.

Export Orders & Tickets

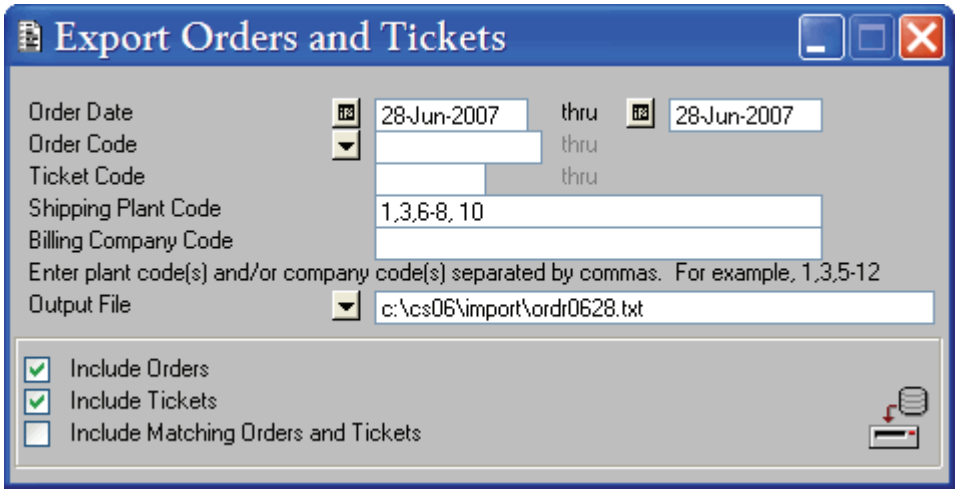
Use the Export Orders & Tickets function to export orders and tickets. The export file can be used as an archive file, or can be transferred to another location for invoicing.

You can select orders and tickets by day, order code, ticket code, plant code, or a combination of the same.

To export orders & tickets:

1. Open the Export Orders & Tickets screen {Manage > Data Management > Export Orders & Tickets}.

Export Orders & Tickets (DBAEXOR)



2. Enter an **Order Date** or range of dates, or detail on the field to select from the Calendar.
3. Enter an **Order Code** or range of codes, or detail on the field to select from a list.
4. Enter a **Ticket Code** or range of codes, or detail on the field to select from a list.
5. Enter a **Shipping Plant Code** or range of codes.
6. Enter a **Billing Company Code** or range of codes.
7. Enter an **Output File** path and file name. The default filename is **`ord[mmdd].txt`**, based on the date of the exported records.
8. Select **Include Orders** to include data from the order files.
9. Select **Include Tickets** to include data from the ticket files.
10. **Accept** the screen to generate the export file.

Automated Data In/Out

The Automated Data In/Out function lets you automate a variety of export and import functions. Sometimes you need to perform exports on a regular basis, but you should do it when there is no database activity.

Setting up permanent parameters in Automatic Data In/Out functions will cause COMMANDcomm to automatically perform these functions on a timed basis based on the **/N=<min>** for Data In and **/O=<min>** for Data Out switches in the COMMANDcomm command line. If these switches are not set, the default time of 10 minutes will be used.

The parameters in the Automatic Data In/Out configuration will control the file names and formats used in these function.

To prevent collisions between COMMANDseries and the third party system reading/writing these files, a lock file (***.lck**) must be used. A lock file is simply a file that indicates that a particular table is currently in use. COMMANDseries contains logic to handle the creation of, or search for this lock file. When COMMANDseries starts a Data In/Out process, it creates a lock file in the directory specified in the ***.txt** line in the **[files]** section of the **cmdseries.asn** file. If the third-party system reading or writing these same files finds a lock file for the file to be read or written, this file must be skipped. If a locked file is not found, it must create a corresponding lock file to indicate that is currently processing the file. Third-party systems must also remove the lock file(s) when the process is finished.

COMMANDseries creates lock files with the naming convention **CDIxxyyy.LCK** :

- **xx** is the function performed.
- **DI** = Data In
- **DO** = Data Out
- **yyyy** is the table being processed (**TICK** = tickets, **CUST** = customer, etc)

Third-party systems must be configured to create lock files named **EXTxxyyy.LCK** where:

- **xx** is the COMMANDseries function.
- **DI** = Data In
- **DO** = Data Out
- **yyyy** is the table being processed (**TICK** = tickets, **CUST** = customer, etc)

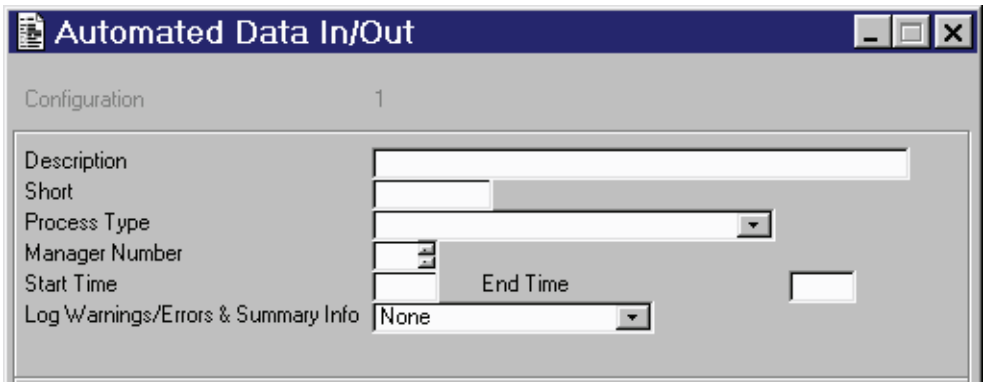
When importing files using any Data In process (manual or automated), the system will truncate any information that is over the maximum field length specified in the database instead of throwing an error. For example, if a maximum field length in the database is 40 characters and there are 45 characters worth of information in that field, the last 5 characters will not go through the import process. In addition, the system will eliminate any leading spaces in fields so more information can go through the import process.

COMMANDseries Order/Ticket import processes have been updated to allow you to import multiple order and ticket files within the same directory, without having to have separate ADIO records for each order and ticket file. Exports can include the plant number and time in the file name, which will make it easier for you to manage since there will be only one folder and one ADIO record for all plants.

To configure an Automated Data In/Out schedule:

1. Open the Automated Date In/Out screen {Files > Automated Data Transfers > Automated Data In/Out}.

Automated Data In/Out screen (EDTADIO)



2. Enter a **Configuration** code to identify the schedule. The code can be up to three characters in length. Detail on the field to select an existing configuration record code from the Automated Data In/Out File. Once selected, this field is unavailable.
3. Enter a **Description** of the schedule.
4. Enter a **Short** description of the schedule.
5. Select a **Process Type** from the drop-down list. Available options are:
   - **`Master File In`**
   - **`Master File Out`**
   - **`Order Out`**
   - **`Ticket Out`**
   - **`Order/Ticker In`**
   - **`Invoice Out`**
   - **`Order Mix to Lab`**
   - **`Order Mix From Lab`**
   - **`Batch Weights Out`**
   - **`Schedule Sample Report`**

   This selection determines the availability of the fields on the lower half of this screen.
6. Enter a **Manager Number**. This value identifies the COMMANDcomm channel that will manage the process. A Manager Number can be entered in this field or the spinner buttons can be used to increase or decrease the number.

   Note: Each COMMANDcomm process must have its own manager.
7. Enter a **Start Time** and **End Time** for the process. For all day, leave the values at **`00:01`** and **`23:59`**.
8. Select a **Log Warnings / Errors & Summary Information** option. The available options are:
   - **`Log Report`**
   - **`None`**
9. **Accept** the screen to save the configuration.

Data Maintenance

The work screens in COMMANDseries provide secondary access to the database. That is, you enter the information, and then COMMANDseries organizes the data and stores it to the database. For everyday business operations, this method of operation is optimal: you enter the information you need to, and the program does the bulk of the work.

Sometimes, though, you need more direct access to the database. You might be trying to understand how a table works so that you can design a new document tag, or you may be trying to troubleshoot a problem with a customer's tickets. The Data Maintenance screen provides you with direct access to the database, where you can see and edit the data first hand.

The screen provides a very flexible tool for editing the database. This section will only document the most commonly-used functions.

WARNING

Because you are accessing your database directly, it is very easy to seriously damage the integrity of your data with this tool.

Topics in this section:

Retrieve a Specific Record or Set of Records

Global Replace

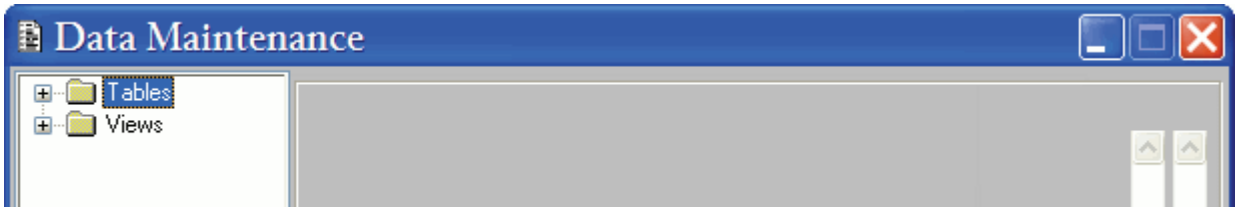
Special Search Operators

To retrieve a table record:

This procedure shows the basic functioning of the Data Maintenance screen.

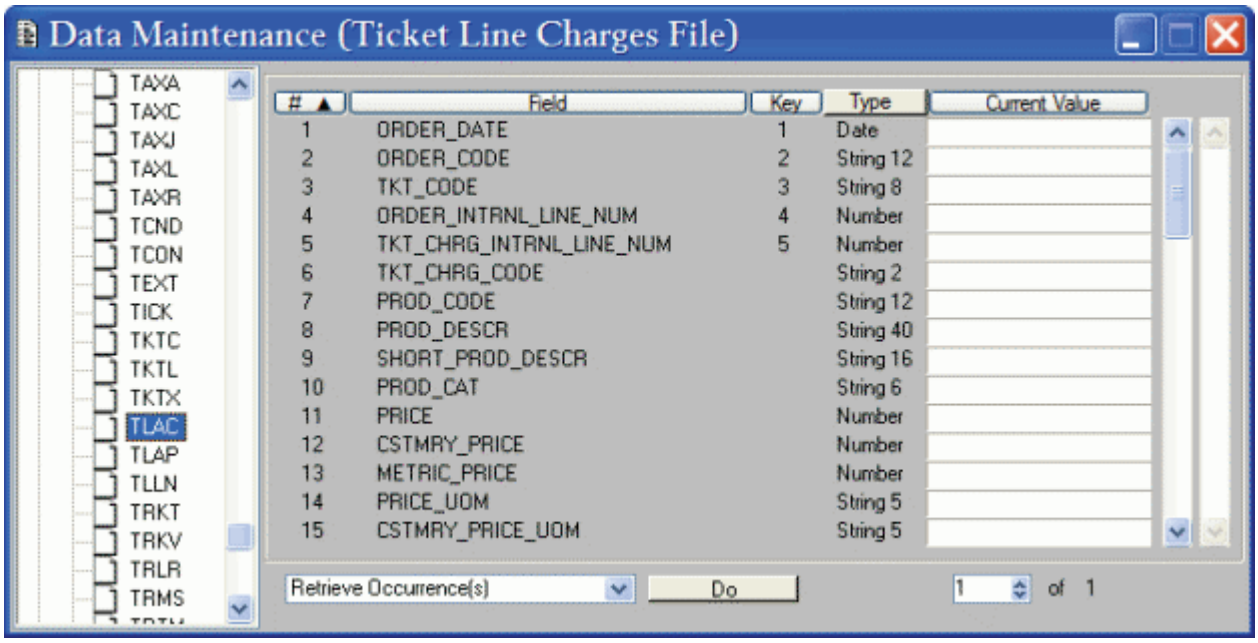
1. Open the Data Maintenance screen {Manage > Data Management > Data Maintenance}.

The Data Maintenance screen (DBAUFLD)



2. The display area to the left allows you to select individual database tables and views.
   - **`Table`** - The primary storage area for the database
   - **`View`** - A temporary lookup index, used to speed processing. Because the views are dependent on the tables, it is highly unlikely that you will need to edit a view.
3. Select the plus sign next to the **Tables** icon to expand the list of tables.
4. Select the table that you wish to view. The table structure will display in the main section of the screen.

Ticket Charges Table (DBAUFLD-1)

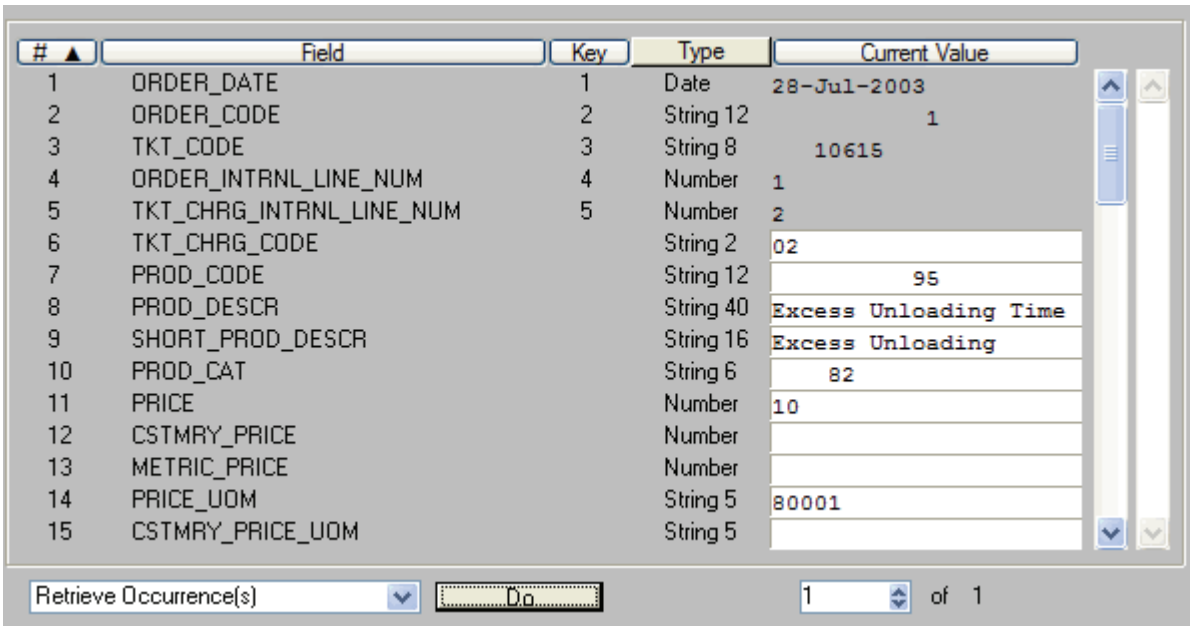


At this point, you are not looking at the contents of the table, but rather, the structure of the database itself. Each numbered line represents an individual field within the table.

Selecting **Toggle Field Display** in the Command field will display the descriptive names of the fields, (for example, **Customer Code**) instead of the database field name (**CUST_CODE**). Viewing the descriptive names can make it easier to find a specific field.

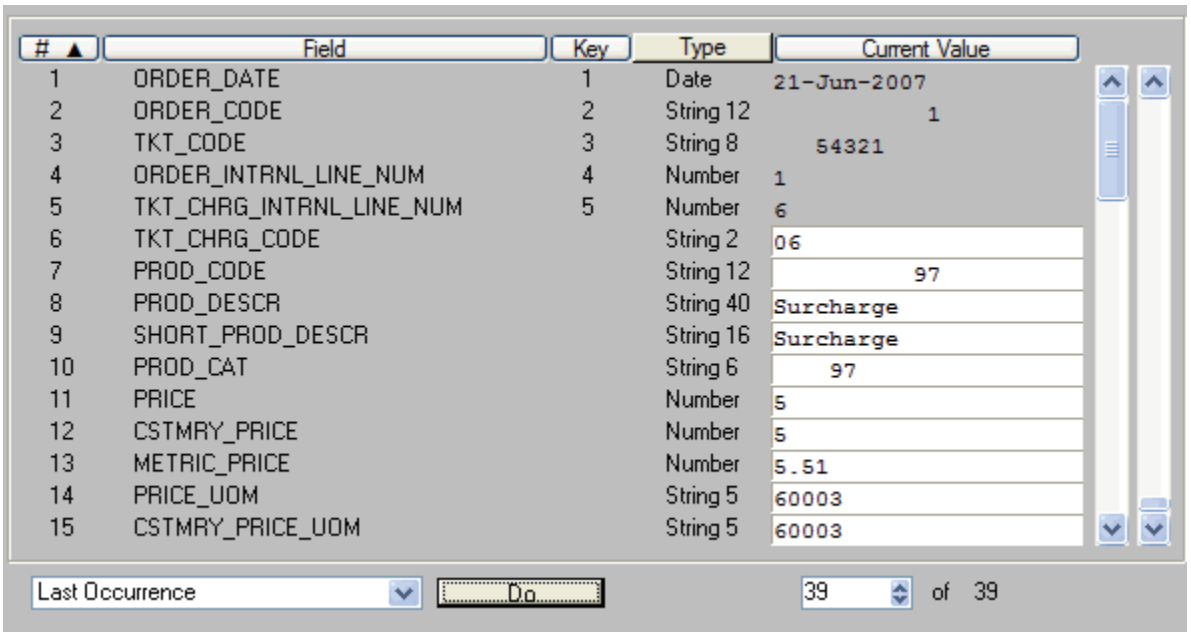
5. The default option in the **Command** field is Retrieve Occurrence(s). Select the **Do** button to execute the Command and retrieve the first record in the table.

Ticket Charges record (DBAUFLD-2)


▲ Field Key Type Current Value
1 ORDER_DATE 1 Date 28-Jul-2003
2 ORDER_CODE 2 String 12 1
3 TKT_CODE 3 String 8 10615
4 ORDER_INTRNL_LINE_NUM 4 Number 1
5 TKT_CHRG_INTRNL_LINE_NUM 5 Number 2
6 TKT_CHRG_CODE String 2 02
7 PROD_CODE String 12 95
8 PROD_DESCR String 40 Excess Unloading Time
9 SHORT_PROD_DESCR String 16 Excess Unloading
10 PROD_CAT String 6 82
11 PRICE Number 10
12 CSTMRY_PRICE Number
13 METRIC_PRICE Number
14 PRICE_UOM String 5 80001
15 CSTMRY_PRICE_UOM String 5
Retrieve Occurrence(s)
Do
1 of 1

6. To retrieve the rest of the records in the table, select **Last Occurrence** in the Command field, and select **Do**.

Data Maintenance screen (DBAUFLD-3) - All Ticket Charge records



7. Review and edit the data as necessary.
8. Select **Store Modified Occurrence(s)** to save the data changes.
9. Close the screen.

Retrieve a Specific Record or Set of Records

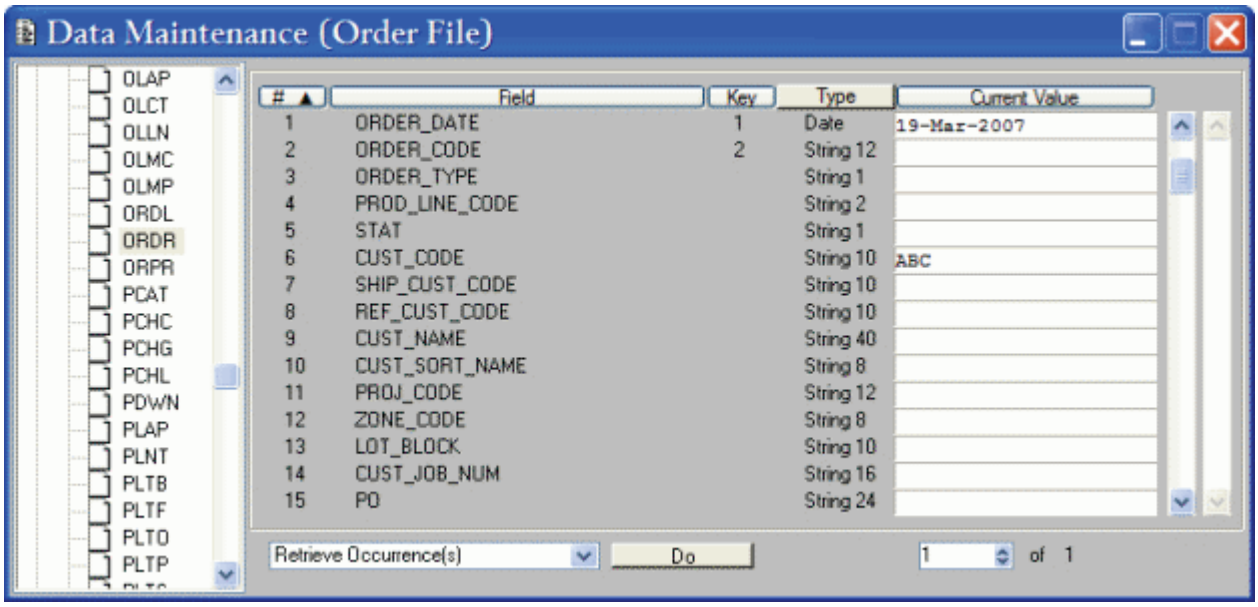
Being able to retrieve a complete table can be useful. When diagnosing a problem with a report, it can help to see the original data being used by the report. Knowing how to retrieve a specific record or set of records makes that process a lot easier.

Suppose you wanted to examine the orders for a single customer during the day to see if certain charges were being applied properly. For this example, we will use Customer Code ABC and March 19, 2007 as the date.

To retrieve a specific record/set of records:

1. Select an appropriate table. This example uses the ORDR (Order) table.
2. Enter a date in the **ORDER_DATE** field. This example uses **`3/19/07`**. When you <Tab> out of the field, the date will be reformatted to read **`19-Mar-2007`**.
3. Enter a customer code in the **CUST_CODE** field. This example uses **`[ABC]`**. The brackets designate that the data is to be key-formatted, ensuring that the entry will be formatted to match the database. When you <Tab> out of the field, the brackets will disappear and the data will be left-justified within the field.

Ready to begin the search

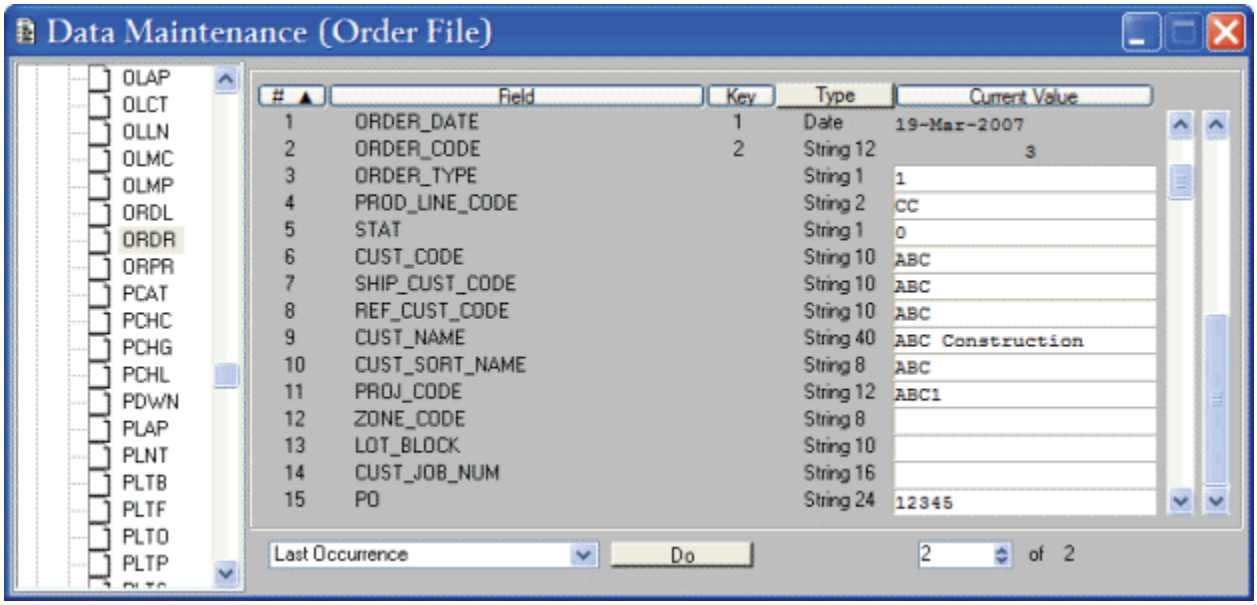


Primary key fields (such those in the ORDR table (Order Date, Order Code, Customer Code, Item Code, etc.), are often used to reference other records. To ensure that the linked fields are formatted identically in both tables (if they are not, searches will fail), they are key formatted so that the system can enforce the correct formatting during data entry.

In the regular application, the formatting happens automatically. In Data Maintenance, however, only date fields will automatically format. The square brackets force the screen to correctly format the data.

4. Select **`Retrieve Occurrence(s)`**. The system will search the database, and the first record matching the parameters will be displayed.
5. Select **`Last Occurrence`**. The system will search the rest of the table. All records matching the parameters will be retrieved.

Search Results



6. Once the records have been retrieved, you can examine the data.

Global Replace

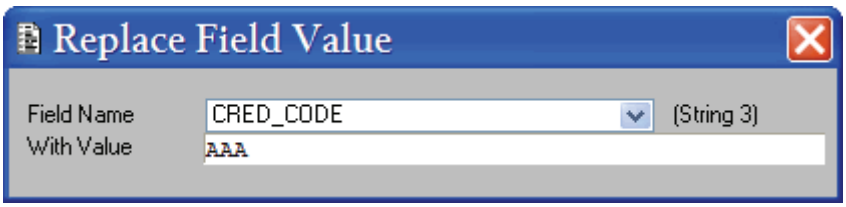
Over the course of time, your use of the system changes, and, in some cases, the program itself changed, through upgrades and service packs. If for example, you changed your credit code structure and needed to modify existing customer records to bring them in line with the new credit code structure.

In this example, we want to select all customer codes with a credit code of **1** and change that code to **AAA.**

To perform a global replace:

1. Select the CUCO (Customer Credit) table.
2. Retrieve all customer records with a credit code of **1**. Refer to the preceding section for details.
3. Right click on the **Credit Code** field. Select **Replace Field Value**. A dialog box will open.

Replace Field Value (DBAUFLD1)



4. Enter the new value (in this case, **AAA**) in the **With Value** field.
5. **Accept** the dialog box. The changes will be made in the display screen.

   Even though you can see the changes on the screen, the changes have not been saved to the database yet. You must proceed to the next step to save the changes!

6. Select **Store Modified Occurrence(s)**.
7. Close the Data Maintenance screen.

Using the Data Maintenance screen effectively requires that you have an extensive knowledge of the COMMANDseries database. In the example above, for instance, you would have to know that the customer credit code was stored in the CUCO table.

COMMANDseries does provide a quick method of determining where a particular piece of information is stored. If you open a customer record, go to the Accounting tab, place the cursor in the Credit Code field, and press <Ctrl+W>, you will see the following in the message line at the bottom of the screen:

Field Message

This text tells you that the Credit code information is stored in a field named **CRED_CODE** in the CUCO table. (EDTCUSTG is the file name of the accounting tab screen.)

In some instances, the file will be **XXX[#]**, such as **XXX2**. In such a case, the field data comes from a database index, not directly from a table.

Special Search Operators

The Data Maintenance screen supports wildcards and search parameters. Those parameters are:

=	Equals
>	Greater than (=> can be used for Equal to or greater than)
<	Less than (=< can be used for Equal to or less than)
!	Single character wildcard
*	Broad wildcard

A special code must be entered to use these values. Before entering parameter, press <Ctrl-+> (You must use the <+> key on the numeric keypad). After pressing <Ctrl-+>, press the parameter. The entered parameter will appear on the screen as gold text. Because of their appearance, these parameters are usually referred to as “gold keys.”

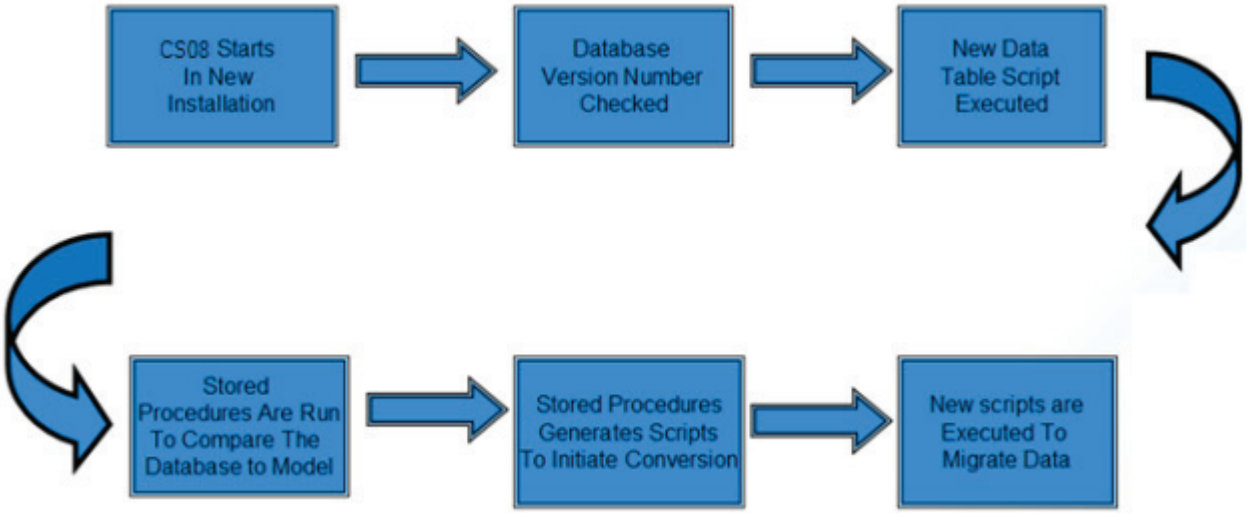
Automatic Database Updates

The structure of the CS08 database is significantly different from that of V5. Variable-length fields, as well as the need for overflow tables, have been eliminated. These and other database improvements have improved database retrieval by as much as 40%.

The database conversion process has been substantially updated as well. In V5, new database columns were simply added at the end of the table, eventually resulting in inefficient table structures. CS now stores the database model within special database tables. When the program starts, it compares its version with the version of the database. If they do not match, you will be prompted to run the automatic database updates. These updates will restructure the database to match the configuration of the current version of COMMANDseries.

The system validates each table against the stored model, and generated a SQL script to restructure the table as needed. The SQL scripts write existing data to temporary files, restructure and initialize the primary database tables, and then copy the information back from the temporary tables.

DB Conversion Map


CS08 Starts In New Installation
Database Version Number Checked
New Data Table Script Executed
Stored Procedures Are Run To Compare The Database to Model
Stored Procedures Generates Scripts To Initiate Conversion
New scripts are Executed To Migrate Data

The update process has three steps:

- Run automatic database updates in COMMANDseries.
- Update your license (if upgrading from an earlier version).
- Run any needed manual database updates.

The time needed for the conversion is dependent on several factors: database size, processor speed, free memory, and available hard drive space. Small databases (under 1GB) have taken as little as 5-10 minutes to convert. Large databases (~20GB) have generally taken 30 minutes to 2 hours to convert.

It is important to restrict access to the system during the conversion, particularly machines that run Comm Managers. During beta testing, someone had to restart a workstation right before the database conversion began. The workstation was not being used for anything COMMANDseries-related—or so we thought. As it turns out, a Comm Manager was launched minimized. In addition, the manager was launched with an audit/log switch, so that it was monitoring database access. The extra load had a massive effect on the conversion process, so that a process that should have taken at most one hour ended up taking six hours.

COMMANDperformance Users

The automatic database update process removes the triggers linking the COMMANDseries database to COMMANDperformance. Please contact your Technical Account Manager (TAM) for a database script to restore the triggers. This script must be run following every upgrade that involves database updates.

Preliminaries

All DBs – To prevent unauthorized users from running database updates, COMMANDseries will not run the automatic database updates unless the switch

```
\dbupdate
```

is in the command line. If the switch is not present, then when the system is started, a message will display stating that database updates must be run and to contact the system administrator.

MS SQL – To prevent the transaction log from growing to unwieldy sizes, SQL Server must be modified prior to running database updates.

- Set the SQL Server recovery model to **`Simple`** before starting the update.
- Set the recovery model back to **`Full`** when the update finishes.

In addition, certain internal processes must be disabled. Open the assignment file, and find the [DRIVER_SETTINGS] section. That section contains a line that looks like this:

```
usys$mss_params= . . . procs=on, . . .
```

Change the procs value to OFF, and save the assignment file.

After the database updates have been run, exit COMMANDseries, change the value back to ON, and restart COMMANDseries.

To run the automatic database updates:

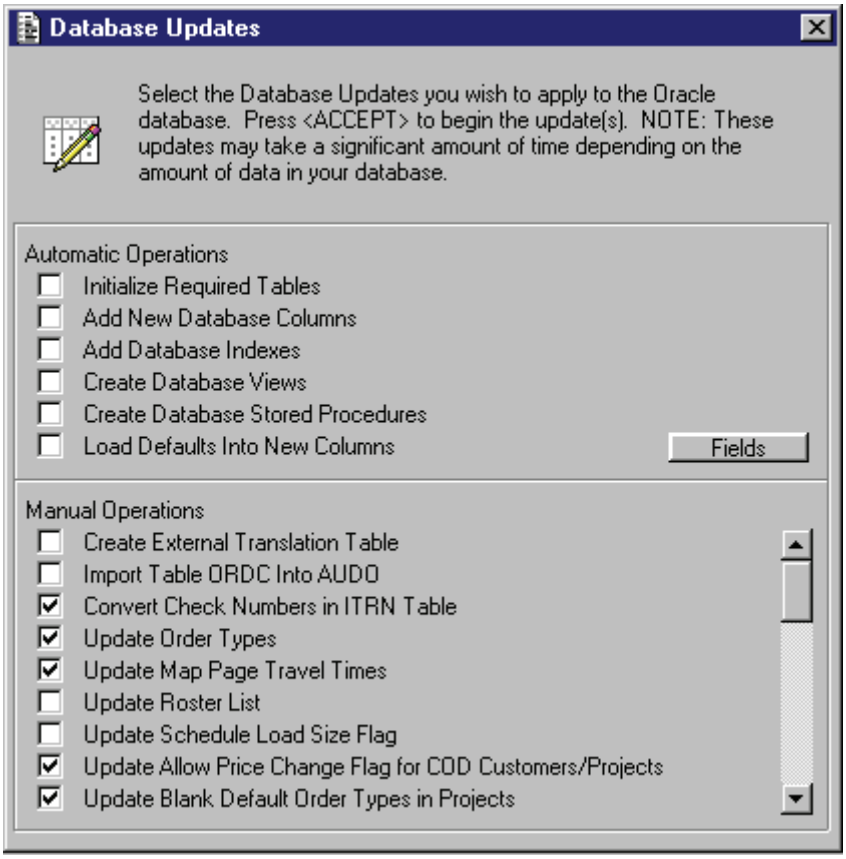
1. From any client, select the COMMANDconcrete or COMMANDaggregate shortcut (depending on the license the customer has). When the application runs, the following message will appear, indicating that Database Updates needs to run:

   ```
   The Database Updates function must be run before proceeding
   with COMMANDseries. Would you like to run it now
   (recommended)?
   ```

   If this dialog does not appear, contact Command Alkon.
2. Press **Yes**. The conversion process will begin. A series of progress bars will track the process.

In some cases, it may become necessary to run the updates manually. As a general rule, you will only want to do so at the direction of your Command Alkon service representative. All Database updates can be manually performed from the Database Updates screen:

Database Update screen (SELVERS)


Database Updates
Select the Database Updates you wish to apply to the Oracle database. Press <ACCEPT> to begin the update(s). NOTE: These updates may take a significant amount of time depending on the amount of data in your database.
Automatic Operations
Initialize Required Tables
Add New Database Columns
Add Database Indexes
Create Database Views
Create Database Stored Procedures
Load Defaults Into New Columns
Fields
Manual Operations
Create External Translation Table
Import Table ORDC Into AUDO
Convert Check Numbers in ITRN Table
Update Order Types
Update Map Page Travel Times
Update Roster List
Update Schedule Load Size Flag
Update Allow Price Change Flag for COD Customers/Projects
Update Blank Default Order Types in Projects

- **Initialize Required Tables** – This routine writes and deletes a dummy record to test that all fields are working correctly. In some cases, a database error can result in a table being "stuck" due to a error writing to the table. The writing/deleting of the dummy record has the effect of resetting the table.
- **Add New Database Columns** – This routine analyzes the database, determines if there are missing fields, and if any are found, generates a SQL script to rebuild to table to include the new field.
- **Add Database Indexes** – Indexes are collections of related data, presorted to make retrieval easier. The system uses a number of views to speed retrieval of frequently used record types. As information in the primary tables changes, the indexes are automatically updated.
- **Create Database Views** – Database views are built in queries used to quickly retrieve data. They are often used as temporary workspaces in certain forms that draw from multiple tables. For example, the Material Manager uses a number of views in building the data on different tabs.
- **Create Database Stored Procedures** – Databases use stored procedures to handle data processing routines. Rather than use generic routines, programs can create customized procedures to match the needs of a particular version and/or database. This routine will generate the stored procedures for your version/database.
- **Analyze Required Tables** (Oracle only)– COMMANDseries maintains a number of database indexes that are used to speed data retrieval. Similarly, the Oracle database

engine maintains metadata on each database schema. The metadata is roughly equivalent to a library's catalog, recording the tables organization and number of tables. This information is used by Oracle to optimize all database access functions.

As the database grows and changes over time, the metadata becomes outdated, which can have an adverse affect on database performance.***To run the automatic updates manually:***

1. Open the Database Updates screen {Manage > Data Management > Database Updates}.
2. Select the desired automatic updates.
3. **Accept** the screen to begin the updates.

Manual Database Updates

The manual updates fall into two general categories:

Updates

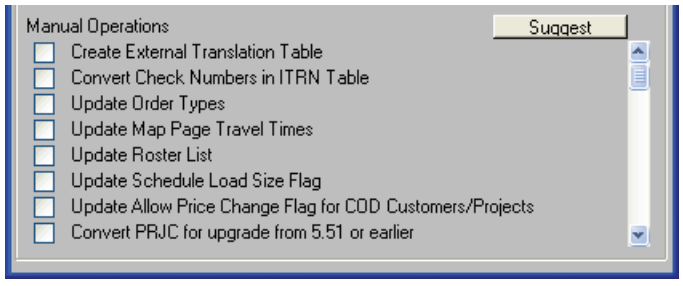
These options modify the database to incorporate new functionality. Unlike the automatic updates, which update the database structure, these updates modify the contents of the database. For example, version 5.51 of COMMANDseries introduced Order Types as a means of recording if an order was a commercial order or an internal transfer. Previously, Order Type was used to determine if an order was Charge or Cash. A new field, **Payment Method**, was created to address that function. Customers upgrading to 5.51 needed a method to update existing order records. The Database Update function "Update Order Types" modifies existing orders to be in line with the new functionality.

Tools

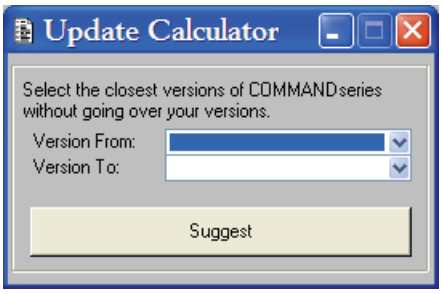
Tools allow you to correct data problems. For example, over time it is possible that duplicate products get entered in project and standing order files. In some cases, the duplicate products are necessary, but in others, the duplication simply wastes valuable server resources. The **Remove Duplicate Products** function will search project and/or standing order files and delete duplicate records.

Suggesting Updates

A **Suggest** button is in the manual update section of the Database Updates screen:


Manual Operations
Suggest
Create External Translation Table
Convert Check Numbers in ITRN Table
Update Order Types
Update Map Page Travel Times
Update Roster List
Update Schedule Load Size Flag
Update Allow Price Change Flag for COD Customers/Projects
Convert PRJC for upgrade from 5.51 or earlier

Press that button to call the Update Calculator screen. Enter your current version and the version to which you are upgrading, and it will generate a list of necessary updates.



The automatic database updates modify the structure of the database. Manual database updates modify the data itself. The following database update routines fall into two categories. Some are used to modify data in accordance with a specific change to the program. Other routines are maintenance utilities designed to address specific issues that may be encountered during regular use of COMMANDseries.

Topics in this section:

- Upgrade Options
- List of Manual Updates
- Maintenance Routines

Upgrade Options

Following are the current COMMANDseries Manual Database Updates. The table below can be used to quickly determine what updates are needed for any given upgrade. Find the customer's current version on the table. When upgrading to the most recent version of COMMANDseries, run the updates for the current version as well as any more recent versions.

Version	Update
V4	Update Roster List
	Update PRJO for Upgrade from 4.21 and Earlier
	Update Customer's Minimum Haul Flag from Version 4 Upgrade
	Update Customer's Ticket Charge Tables from Version 4 Upgrade
	Update Customer's Trade Discount Amount UOM form V4 Upgrade
	Update Prepayment Adjustments Linkage to Invoices
	Load Order Line Delivered Quantity
5.50 (D14)	Update Order Types
	Rebuild Current and Future Schedule Loads
5.51	Convert Check Numbers in ITRN Table
	Update Map Page Travel Time
	Convert PRJC for Upgrade from 5.51 and Earlier
	Convert Price Type Field for Upgrade from V5.51 and Earlier

Version	Update
5.52	Update Allow Price Change Flag for COD Customers/Projects
	Update Blank Default Order Types in Projects
	Clear NEXT_* Fields in TRUC Table
5.53.16	Update Payment Forms in Orders/Tickets/Invoices
5.54	Update Batch Entry ID for Payments
	Correct Zone Price Plant for Wild Card Price Category
5.57.4	Initialize GPS Polling for Orders/Projects from Configuration Settings
5.57.10	Convert Sundry/Misc Charges for Upgrade from 5.57.9 and Earlier
5.57.12	Update Accumulation for Items
CS06 1.0.B	Convert SIGU Records
CS06 1.0.D	Change all Schedule statuses to Order status
CS06 1.0.F	Truncate Credit Card Numbers to Last Four Digits
CS08 2.7	Convert USCF to FCUS Records
CS08 2.15	Update GUID Fields for Integration
CS08 2.15	Update EDX Synchronization Status

There are two additional upgrade-related updates that fall outside of the standard list:

- If upgrading from 5.51, run **Update Schedule Load Size Flag**.
- If upgrading to V5 Tracking and Scheduling (formerly called GIM), run **Create External Translation Table**.

List of Manual Updates

Below are descriptions of the database updates. Some updates are sxclusive to V2 or V3.

Convert Check Numbers in ITRN Table

A new feature implemented in V5.52 uses one field in the ITRN (Invoice Transactions) table to store either the check number or the credit card number used to pay for an invoice. Because credit card numbers are longer than check numbers, the field must be large enough to accommodate the longer character string.

The automatic database update converted the database field to the new length. This routine reformats the existing data for the new field length. No user input is required.

Update Order Types

Until V5.51, Order Type basically meant cash or charge. In V5.51, a new system was implemented. Order Types now denote the type of sale (regular sale, internal transfer, etc.), while a new field, **Payment Method**, stores the record of how the order is to be paid. This routine updates existing order records to version 5.51.

Once this option is selected, no input is necessary.

This update should only be run once. Running this update a second time can corrupt existing COD orders.

Update Map Page Travel Times

In earlier versions of COMMANDseries, one Travel Time was used to schedule time to and from the site. Effective in V5.52, Map Pages store one time for travel to the site, and another time for the travel back to the plant. This routine takes the single Travel Time from earlier Map Pages and copies it to both to and from time fields. Once this option is selected, no user input is required.

Update Roster List

The structure of the roster table was changed in V5.51 to enable using the roster to dispatch past midnight. This routine reformats the changed fields. No user input is required.

Update Schedule Load Size Flag

The Schedule Load Size feature was initially implemented in V5.51. In V5.52, we changed the way the flag was stored. This routine updates the flag to the new format. The functionality of the feature is not changed in any way. Once this option is selected, no user input is required.

Update Allow Price Change Flag for COD Customers/Projects

In previous versions of COMMANDseries, the ability to edit item prices for COD Customers or Projects at the Order level was strictly a function of the Customer/Project Credit Type: if it was COD, the price fields were available. V5.53 has enabled field-level security for all pricing fields. As a result of this new functionality, prices on a COD order will not be available unless the **Allow Price Change in O/E** flag in the Customer/Project Pricing tab is selected.

This routine reads through all Customer and Project files, finds all records that have a **Credit Type** of `Cash Only`, and checks the **Allow Price Change** flag. No user input is required.

If this update is run, **Update Blank Default Order Types in Projects** must also be run at the same time.

Convert PRJC for Upgrade from V5.51 and Earlier

The PRJC table was restructured to enable key indexing. This routine updates the table structure. No user input is required.

Convert Price Type field for Upgrade from V5.51 and Earlier

This routine adjusts Price Type records to accommodate the new Fixed Material Delivered Price feature. The routine checks all pricing records in order and project files.

- If the original **Delivery Price Type** was FOB, the new **Price Type** will be FOB.
- If the original **Delivery Price Type** was Delivered, the new **Price Type** will be Fixed Cartage Delivered.

In addition, the routine will also update existing records as follows:

- All tickets with a null **Material Price** field will be updated with the corresponding value from the associated order file.
- The routine will validate the **Price Type** values for Customer defaults (in the configuration file) and existing Customer Product records (CPRD). If the value is blank, it will be set to "1" (FOB pricing).

The routine will run automatically once it is selected. No user input is required.

Rebuild Current and Future Schedule Loads

Version 5 uses two separate tables to store schedule records, while Version 4 used one. In addition, V5 schedules include two additional fields, **Time to Job** and **Time to Plant**. This routine scans current and future orders. If an order is found with a Travel Time value but no Time to Job or Time to Plant value, the Travel Time value will be used to populate both fields. No user input is required.

If this update is not run, any current and future orders imported from V4 will not display on the Tracking screen.

Update Blank Default Order Types in Projects

This update scans all projects to determine if there is a value in the **Default Order Type** field {Projects > Distribution}. If there is no value, the value will be set to the setting for the Customer default {Files > Configuration > Defaults > Distribution}. Normally, the default will be **Regular Sale**. No user input is required.

If this update is run, **Update Allow Price Change Flag for COD Customers/Projects** must also be run at the same time.

Update PRJO for upgrade from 4.21 and earlier

Some fields that were stored in the PROJ table in V4 are stored in the PRJO table in V5. This routine moves the affected fields to the new table. No user input is required.

Update Customer's Minimum Haul Flag from Version 4 Upgrade

Version 4 stored minimum haul flags in a different field than V5. This update will copy customer and project-level minimum haul flags stored under V4 to the corresponding fields in V5. No user input is required.

Update Payment Forms in Orders/Tickets/Invoices

Earlier versions of COMMANDseries used Payment Method to determine how an order was paid: Charge, Cash, Check, or Credit Card. Payment Methods have been supplanted with Payment Forms. The advantage of Payment Forms is that you have more flexibility in creating payment types.

Once Payment Forms have been entered, run this update to populate the Payment Form field on existing orders, tickets, and invoices. No user input is required.

Update Customer's Ticket Charge Tables from Version 4 Upgrade

This updates minimum load, unloading, and seasonal charge settings in customer and project records. If a given flag is false, the corresponding field is cleared. The update ensures the database is in line with V5 functionality rather than V4. No user input is required.

Update Customer's Trade Discount Amount UOM from V4 Upgrade

This routine will check all customer and project files. If the **Trade Discount Amount UOM** field is blank, it will be set to Yards/Meters (Concrete) or Ton/Tonnes (Aggregate), based on the measurement system specified in the system configuration or in the project. No user input is required.

All V4 users who use trade discounts should run this update when upgrading to V5.

Clear NEXT_* fields in TRUC table

COMMANDseries V5.53 stores aggregate truck assignment data differently than in previous versions. Specifically, the program uses a different method to store a truck's next assignment. To prepare existing data for this new functionality, any user upgrading to V5.53 must run this routine to clear existing information from the TRUC file. No user input is needed.

Update Prepayment Adjustments Linkage to Invoices

V5 uses a different logic in applying adjustments than V4. This routine identifies prepayment adjustments made in V4 and updates those records to accommodate the new adjustment logic.

When the update is run, you will be prompted for a date range. The routine will update all adjustment batches within that range.

Load Order Line Delivered Quantity

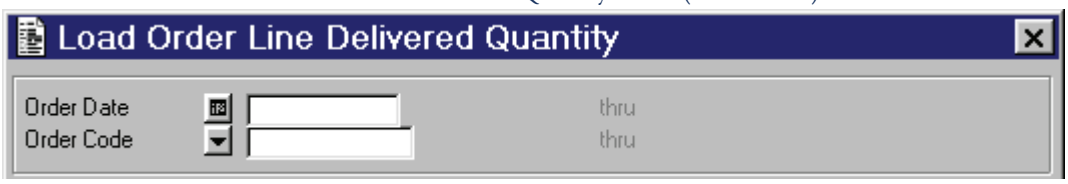
The Delivered Quantity field in the ORDL (Order Line Item) table is the sum of the Delivered Quantity fields on all of the order's tickets. It is possible that the ORDL table can lose its integrity, either through system or user error. This routine recalculates the ORDL Delivered Quantity fields by summing up the associated tickets.

It is recommended that this routine be performed when upgrading from V4 to V5 as a precautionary measure.

The routine does not have to be run on all orders and tickets, particularly if the user retains records in the database for more than a year. General guidelines for what date ranges to update are as follows:

- Command Alkon recommends that the previous year's data be updated.
- Any dates that have not been invoiced – that is, the orders were entered and ticketed in V4 but will be invoiced in V5 – **must** be updated.
- Any dates that have not been posted to COMMANDexecutive – that is, the orders were entered and ticketed in V4 but will be posted to COMMANDexecutive in V5 – **must** be updated.

Load Order Line Delivered Quantity screen (DBAORDL)



Regardless of the module from which this update is run, the routine will recalculate both concrete and aggregate orders.

Update Batch Entry ID for Payments

Effective in 5.54, when a payment is entered, a unique ID is assigned to all invoices paid with that payment, cash, check or credit card. This payment ID is used by various routines, such as Void Payments and Deposit Registers, when recalling payment information.

This update populates each existing payment with a unique entry ID. No user input is required.

Correct Zone Plant Price for Wild Card Price Category

This update converts ZNPC entries with wild card (**#**) price categories to correct ZNPL entries. If an existing ZNPL record conflicts with a price in ZNPC, the routine generates a report to notify the user, with instructions to correct the error. No user input is required.

Initialize GPS Polling for Orders/Projects from Configuration Settings

This update should be run only after system-level GPS polling defaults have been set. The update will then write those defaults to all existing orders and projects. No user input is required.

This update is intended for users adding GPS functionality, and should not be used by a customer who already has GPS configured.

Update Accumulation for Items

5.57.12 adds additional options for configuring accumulation of admixes and admix designs. The new options necessitated modifying the exiting **Accumulation Code** field from one character to two characters. This update reformats the existing one character values to a valid two-character format.

Convert Sundry/Misc Charges for Upgrade from 5.57.9 and Earlier

5.57.10 adds the ability to charge sundry, unloading, seasonal, and minimum load charges at the Company and/or Plant level. This new functionality involves a restructuring of the various charge tables. When COMMANDseries is first run after the upgrade, the new database tables and fields are added to the existing charge records, but all new fields are set to null.

This update will establish the existing charge schedule for each type of charge as the default charge—both Company and Plant will be set to **All**.

Note: This update must be performed prior to attempting any order entry, dispatch, or invoice activity, or else store errors will occur.

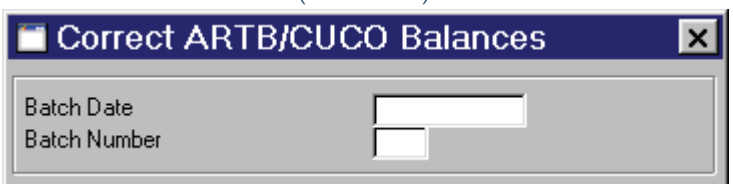
Maintenance Routines

These routines are not associated with specific version upgrades, but are run to address specific issues with database integrity. As a general rule, these updates should only be run on advice from a Command Alkon Service Representative.***Correct ARTB/CUCO Balances***

It is possible that the CUCO (Customer Company/Credit) records can become corrupted, or that they may get miscalculated. This routine will recalculate CUCO records based on the data from the ARTB (A/R Transaction Balance) table.

When this routine is run, you will be prompted for a specific batch date and number. Once the information is provided, no additional input is required.

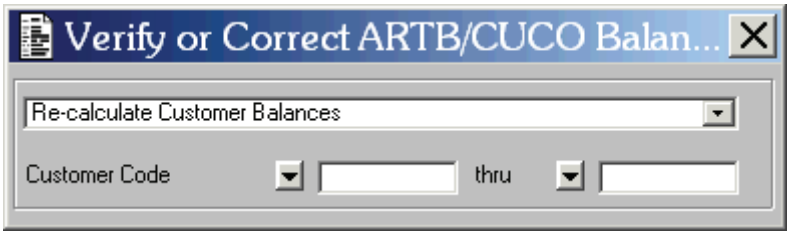
(DBARPCR)



Verify/Correct ARTB/CUCO Balances by Customer

This routine works just like the previous routine, except that instead of correcting by batch, you correct by customer. Since balance errors are generally discovered at the customer level, the customer is more likely to use this routine than the previous one.

(DBACBAL)



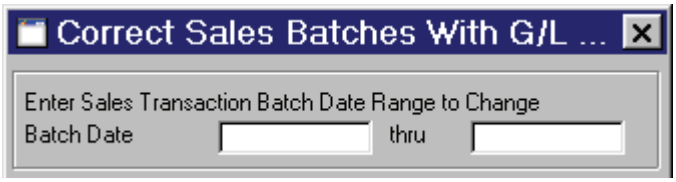
The drop-down list lets the customer select two options:

- **`Verify Customer Balances`** generates a report that identifies customer balances that do not balance with the associated detail records.
- **`Recalculate Customer Balances`**

Correct Sales Batch With G/L Out of Balance

When this option is selected, you will be prompted for a date range.

Date range (DBACGLD)



Enter the date range to correct. You will not be prompted to select a specific batch or sequence. The routine will examine all sales batches within the specified range. A list of the corrected sequences can be found in the message log at the bottom of the screen.

If you have been running 5.53.7 or 5.53.8 and are encountering corrupt data in sales batches, do not use this update.

Remove Duplicate Products

While COMMANDseries does not allow for duplicate item codes in the Item Master file, it does allow for duplicate codes in project and standing order files. Some users take advantage of this feature by using multiple entries to better track mix usage.

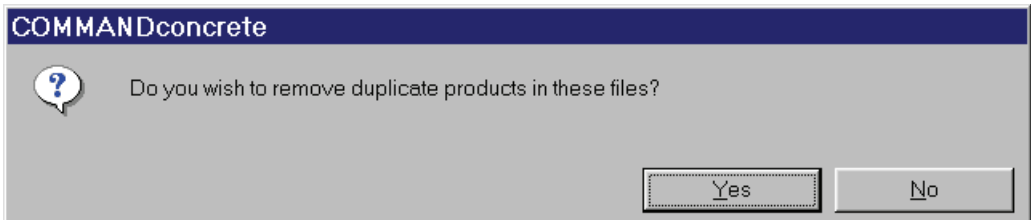
This routine will clean project and standing order records, eliminating duplicate product entries. When duplicate entries are found, the first occurrence is retained, while all others are deleted.

When the menu option is selected, you are prompted to select what records you want to clean.

(DBADUPL)

Simply select the options you want and accept the screen. You will be prompted for confirmation.

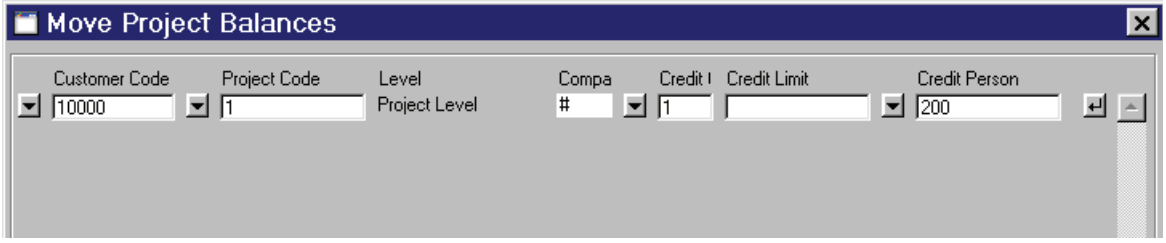
Confirm the deletion



The selected records will be cleaned.

Move Project Balances

(DBAMVPB)

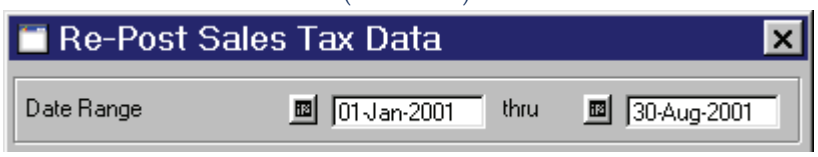


This update is for a specific customer, and cannot be run by another customer.

Repost Sales Tax Data

Sometimes, sales tax data does not post properly. When this happens, you can use this routine to repost just the sales tax portion of a batch. When the routine runs, you will be prompted for a date range.

(DBARPST)



The routine will repost sales tax data for all batches with batch dates that fall within the specified range.

Create TKTX record for ticket without any TKTX record

In some cases, Ticket Tax records are not created due to errors in the data. If this should occur (CA Service will help determine if such is the case), this routine will prompt for a date range:

(DBACTKX)

Upon acceptance, the form will create TKTX records for any tickets within the date range that do not have any corresponding records. Existing TKTX records will not be affected.

Convert USCF to FCUS Records

The older (non .NET-based) version of FNDCODE stored configuration settings in the USCF table. The .NET version stores its settings in the FCUS table. This routine converts configuration settings from the older version of FNDCODE to the newer.

Update GUID fields for Integration

The Item Master table (IMST) has been updated with a new field, GUID (Global Unique ID), an ID code used by COMMANDedx when synchronizing data between systems. A GUID will be generated whenever a new record is created. A new manual database update, Update GUID fields for Integration, will generate GUIDs for existing records (provided that the GUID field is null).

Update EDX Synchronization

A new field, EDX Synch Status Code, has been added to the Item Location table (ILOC). This field replaces the Item Status Code field for useby EDX in identifying records that are to be synchronixed via EDX. This update will scan each ILOC record, copying the Item Status Code value to the EDX Synch Status Code field.

SQL Worksheet

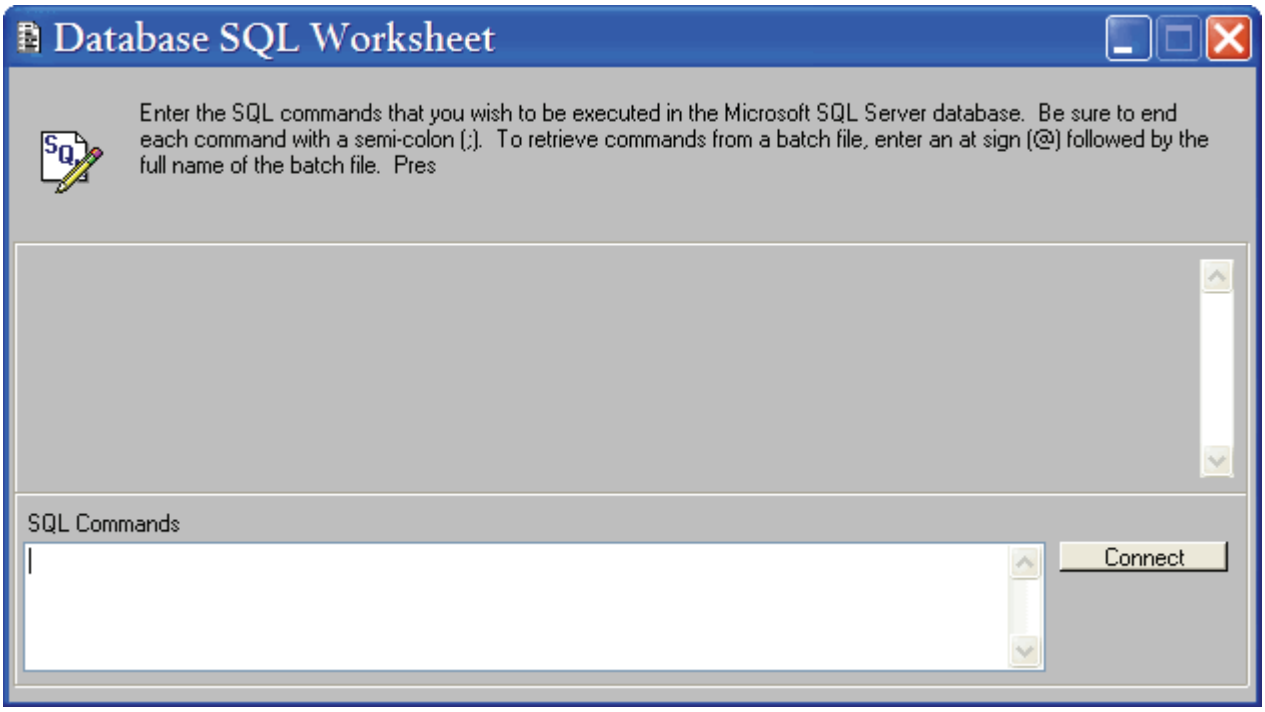
You can use an SQL script to execute commands on a database. Normally, you have to launch an SQL-script program to execute a script. COMMANDseries provides an internal interface for running SQL scripts.

Do not run SQL scripts unless you are the system administrator. Improper use of an SQL script can cause serious damage to the database!

To use the SQL worksheet:

1. Open the Database SQL Worksheet screen {Manage > Data Management > Database SQL Worksheet}.

Database SQL Worksheet (DBASQLW)


Database SQL Worksheet
Enter the SQL commands that you wish to be executed in the Microsoft SQL Server database. Be sure to end each command with a semi-colon (;). To retrieve commands from a batch file, enter an at sign (@) followed by the full name of the batch file. Pres
SQL Commands
Connect

2. Enter the SQL script command in the **SQL Command** box.

   There are small variations in commands and syntax between Oracle and MS SQL. Be sure to use syntax appropriate to your database.
3. **Accept** the screen to execute the SQL script. The messages from the SQL script will be displayed in the large message area.
4. If you need to connect to your SQL server using a login different from your COMMANDseries username, select the **Connect** button. You will be able to log in using a different name.The login screen supports usernames and passwords of up to 32 characters.

Database Locks

When a user accesses a particular record in a table, the database locks that record so that no other user can access that record. This lock prevents the chaos that would occur if two people attempted to edit the same information at the same time.

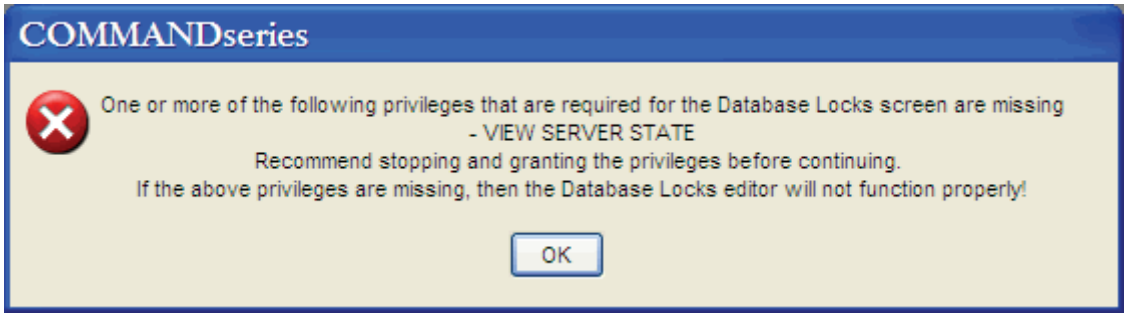
Normally, when you are finished with the record, either by accepting a screen or closing a screen, that record is released so other people can access it.

If COMMANDseries or the server should crash, however, there is a possibility that a record can get stuck in a locked status, preventing anyone from accessing the data.

The Database Locks screen lets you see what records are locked, and by what user. If necessary, you can terminate a user session, releasing all records in use by that user. You can only terminate a session from this screen on an Oracle system; it you are running SQL Server, this screen can be used to determine what session must be killed in SQL Server Manager.

Terminating a user session can result in data loss. This function should only be used in an emergency!

Users must have the database permission View Server State to run this form; if you do not have the permission, the following message will display:

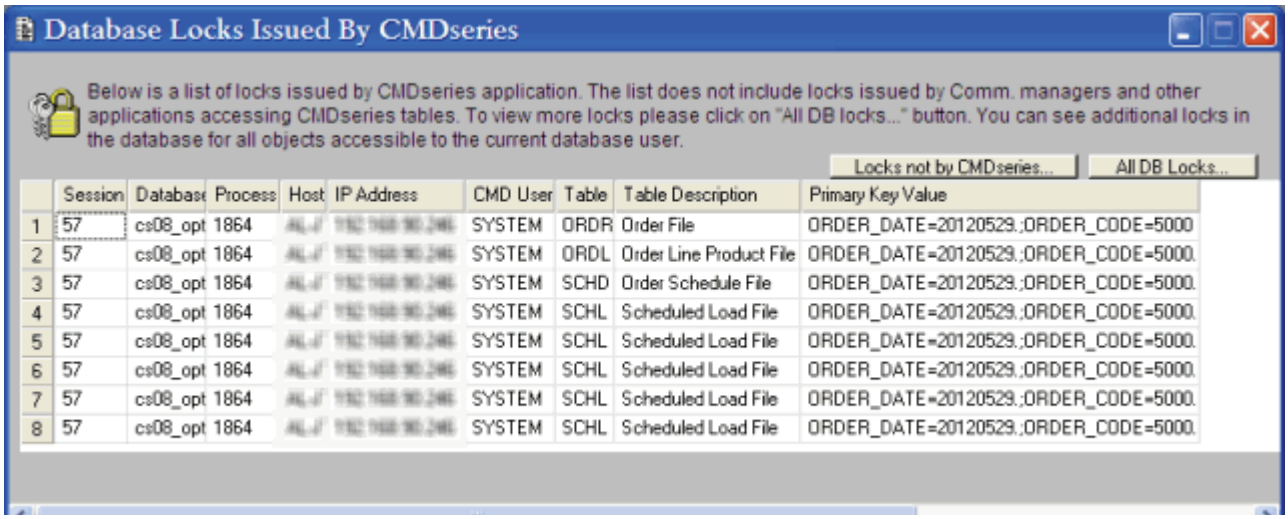

COMMANDseries
One or more of the following privileges that are required for the Database Locks screen are missing
- VIEW SERVER STATE
Recommend stopping and granting the privileges before continuing.
If the above privileges are missing, then the Database Locks editor will not function properly!
OK

In addition, **Show Blocking User Name** on the Configuration-System tab should be selected.

To use the database locks screen:

1. Open the Database Locks screen {Manage > Data Management > Database Locks}.

Database Locks screen (DBALOCK)


Database Locks Issued By CMDseries
Below is a list of locks issued by CMDseries application. The list does not include locks issued by Comm. managers and other applications accessing CMDseries tables. To view more locks please click on "All DB locks..." button. You can see additional locks in the database for all objects accessible to the current database user.
Locks not by CMDseries...
All DB Locks...
Session Database Process Host IP Address CMD User Table Table Description Primary Key Value
1 57 cs08_opt 1864 SYSTEM ORDR Order File ORDER_DATE=20120529.;ORDER_CODE=5000
2 57 cs08_opt 1864 SYSTEM ORDL Order Line Product File ORDER_DATE=20120529.;ORDER_CODE=5000.
3 57 cs08_opt 1864 SYSTEM SCHD Order Schedule File ORDER_DATE=20120529.;ORDER_CODE=5000.
4 57 cs08_opt 1864 SYSTEM SCHL Scheduled Load File ORDER_DATE=20120529.;ORDER_CODE=5000.
5 57 cs08_opt 1864 SYSTEM SCHL Scheduled Load File ORDER_DATE=20120529.;ORDER_CODE=5000.
6 57 cs08_opt 1864 SYSTEM SCHL Scheduled Load File ORDER_DATE=20120529.;ORDER_CODE=5000.
7 57 cs08_opt 1864 SYSTEM SCHL Scheduled Load File ORDER_DATE=20120529.;ORDER_CODE=5000.
8 57 cs08_opt 1864 SYSTEM SCHL Scheduled Load File ORDER_DATE=20120529.;ORDER_CODE=5000.

The screen will list current locked records.

2. Select the record that you need to release.
3. Press <Shift+F5> or the **Remove** button on the toolbar. A confirmation box will display.
4. Select **Yes** to terminate the user session.

If your system is interfaced with third party applications, either through COMMANDedx or another interface, it is possible taht you can have database locks originating from a program other than COMMANDseries. The two buttons at the top of the form allow you to control what locks are displayed:

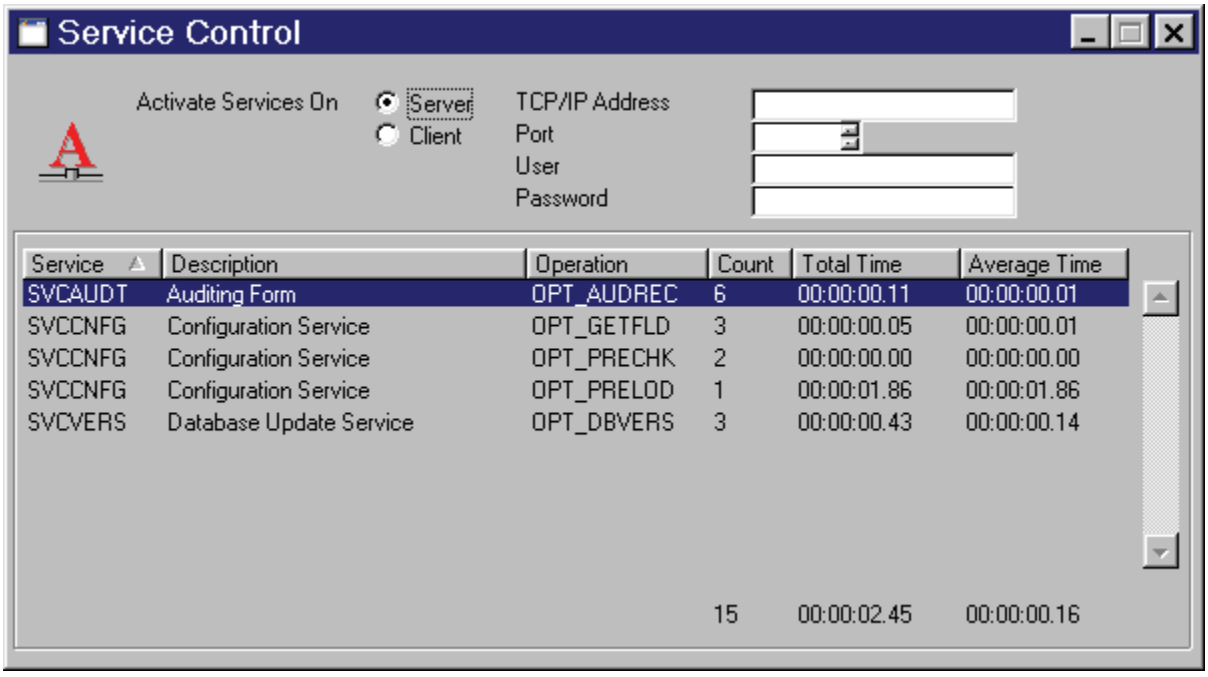
- Locks not by COMMANDseries
- All DB Locks

Pressing these buttons does not change the display in the current form; rather, it opens up a new form on top of the current one.

The **All DB Locks** button shows all database locks that include locks from Comm Managers and external processes. In addition, you can view the Comm Manager number, the Client Machine, and the Client Process ID.

Service Control

The Service Control screen is a tool for performance monitoring. It lists the services used in the application, the number of times they have been used during the current log in, and the total and average times it took for them to perform their given service.



The screen gives the option of viewing Client and Server services. This option has been created for future use, as currently all COMMANDseries installations are done on the client.

Comm Manager Console

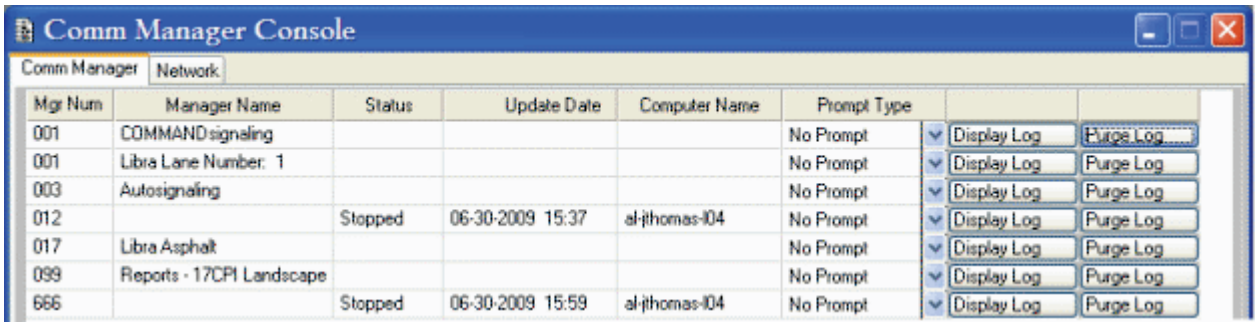
The Comm Manager Console allows you to monitor all active comm managers and prevents multiple identical comm manager processes from executing concurrently.

A new field, **Com Manager Threshold**, has been added to the Configuration-Defaults tab. The system uses this value (in seconds) to evaluate a manager's current status.

A new database table, Comm Manager Console Table (CMCT), has been created to store information about current comm managers. A CMCT record is created for a comm manager the first time it is started and is updated every time data from the comm manager is processed by CMDseries. Every time a comm manager is started, it checks the CMCT table. If the CMCT indicates that manager is already active, the system will prevent the duplicate instance from starting.

Console

The Comm Manager Console is located at {Manage > Data Maintenance > Comm Manager Console}:


Comm Manager Console
Comm Manager
Network
Mgr Num
Manager Name
Status
Update Date
Computer Name
Prompt Type
001 COMMAND signaling No Prompt Display Log Purge Log
001 Libra Lane Number: 1 No Prompt Display Log Purge Log
003 Autosignaling No Prompt Display Log Purge Log
012 Stopped 06-30-2009 15:37 al-jthomas-l04 No Prompt Display Log Purge Log
017 Libra Asphalt No Prompt Display Log Purge Log
099 Reports - 17CPI Landscape No Prompt Display Log Purge Log
666 Stopped 06-30-2009 15:59 al-jthomas-l04 No Prompt Display Log Purge Log

The list is populated by scanning the database for assigned managers – signaling units, order printers, batch interfaces, etc. Once the list of managers is assembled, additional information on those managers is drawn from the CMCT table, and is updated every 30 seconds or whenever a manager is polled.

The console displays CMCT records with statuses as follows:

- **Blank** – Either the manager has never been started, or the last update time in CMCT is more than 24 hours old.
- **Running** – The last status update time is within the value assigned by the Com Manager Threshold.
- **Processing** – The comm manager is processing a command.
- **Stopped** – The manager has been stopped.
- **Not Responding** – The last status update is less than 24 hours old, but outside the Com Manager Threshold.

Prompt Type

The **Prompt Type** field determines how the comm manager reacts when a user attempts to start a comm manager when an instance is already running, but the manager is considered unresponsive based on the established polling interval. These three options replace a **`/F`** command line switch.

- **`No Prompt`** – The system will restart the comm manager.
- **`Prompt User`** – The system will notify you that an instance is already running and prompt you to continue or cancel.
- **`Hard Stop`**– The system will notify you that an instance is already running and that you cannot continue. When you press OK to acknowledge, the new instance will close.

Context Menu

If you right-click on a manager, the context menu will contain two key commands:

Stop – Stops the selected comm manager.

Restart – Restarts the selected comm manager. You can start a manager that is not responding, but if the comm manager instance has closed, it cannot be restarted from the console.

Network tab

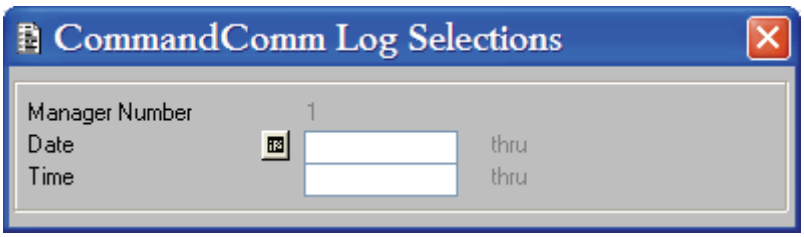
The Network tab will display the current users, using the CMDnetwork Client list. This list is for reference purposes only.

This list will only show the users connected to the client's CMDnetwork server. If your system has multiple CMDnetwork servers, clients on the other servers will not be included on this list.

Logging Functions

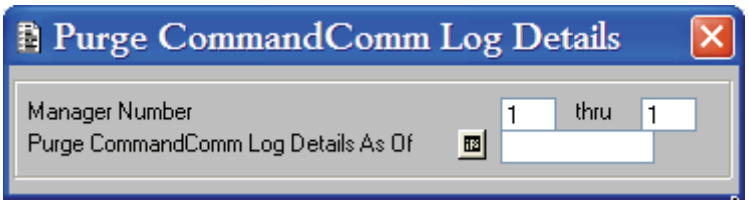
The system logs information on each comm manager to the CMML table. Adding the commandline switch **/COMMDETAILLOG** will have that comm manager log every message it sends or receives. Log information for a comm manager can be viewed by pressing the **Display Log** button.

Log Selection screen (SELCMML)



CMML records can be purged using the **Purge Log** button. Purging the table has no impact on production.

Purge COMMANDcomm Log Details (DBACMML)



Please note that the Purge option allows you to purge records for multiple comm managers at once, while the Log Selections screen will only retrieve records for one comm manager at a time.

Run Comm Managers as a Windows Service

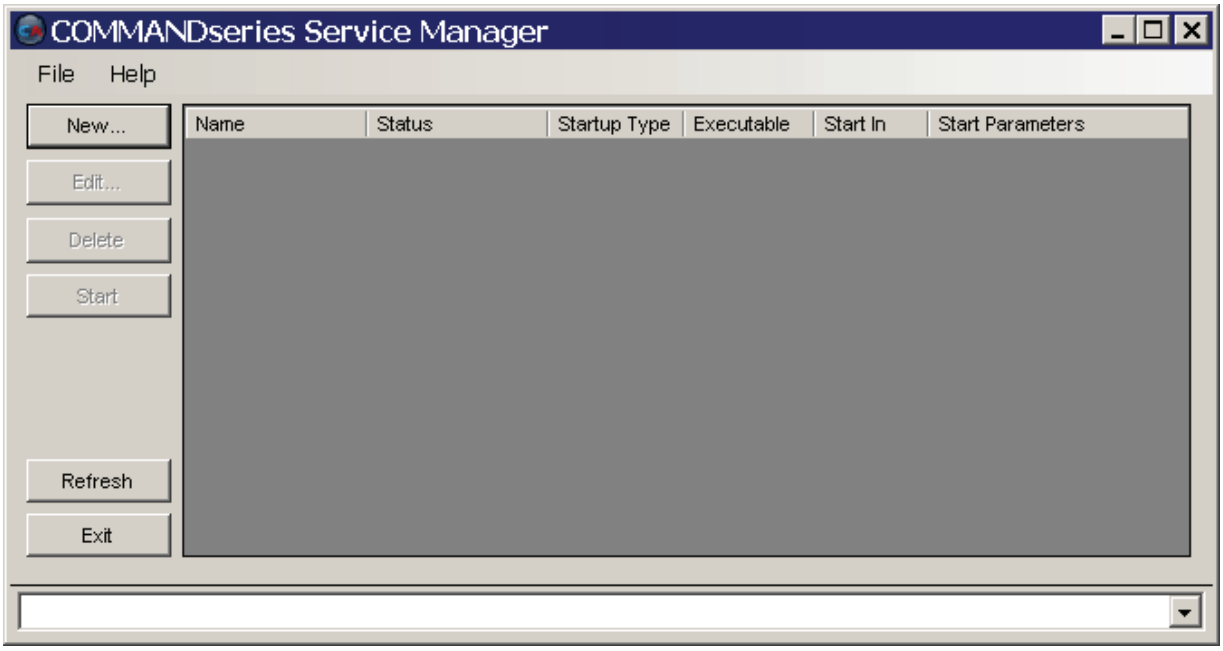
Comm managers can now be run as Windows services. To effect this change, two new execurables have been added to the CMDSERIES\BIN directory:

cmdserieService.exe – This is the application that will run to create the service. It will not be run manually.

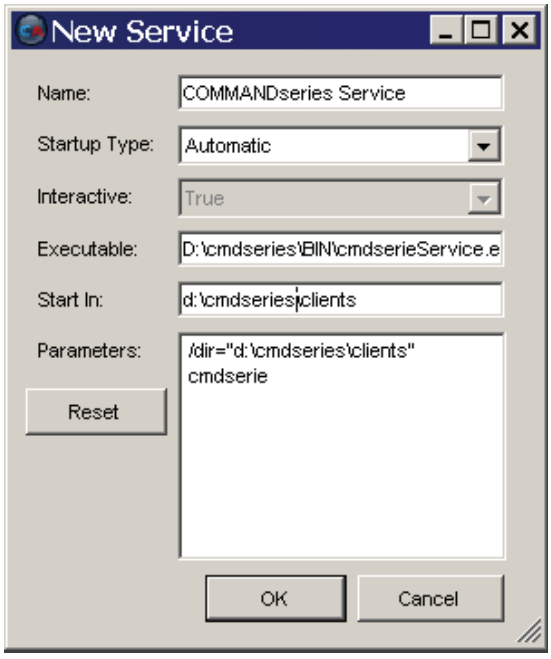
cmdserieServiceManage.exe – This program is used to create and configure all COMMANDseries services on a system, including COMMANDnetwork.

To configure a new service:

1. Run the **cmdserieServiceManage.exe** application. The initial screen will show you all existing services.



2. Press the **New** button to call the New Service screen.



Name – The name for the service: COMMANDnetwork, Mgr #32, etc.

Startup Type – The startup method. Options are

- **Automatic**: The service will be started with Windows.

- **Manual**: The configuration will be saved, but the service must be manually started.
- **Disabled**: Used for services that are temprarily unneeded.

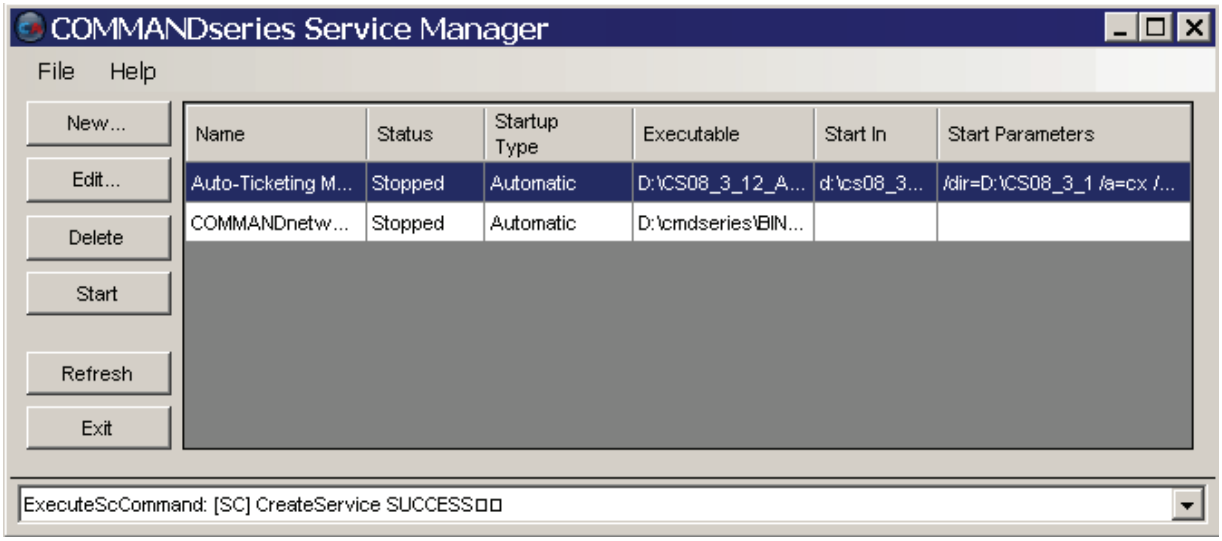
Interactive – An interactive service can be displayed on the screen. Comm Managers and COMMANDnetwork cannot effectively unless these values match, which is why this field is disabled in the individual service editor. The value for all services managed in this program can be edited from the Files menu.

Executable – In this field, specify the path to the cmdService.exe file or the cmdnetw.exe.

Start In – If configuring a comm manager, specifiy the location of the assignment file. This field is not required if configuring a COMMANDnetwork service.

Parameters – If configuring a comm manager, specifiy the command line parameters just as you would on a COMMANDcomm shortcut. This field is not required if configuring a COMMANDnetwork service.

When you press OK, the program will store the parameters and return to the manager screen.

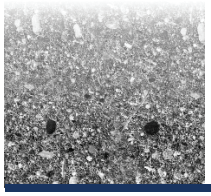


You can start services manually from this screen, or restart the computer to start any automatic services.

Services can also be edited or deleted from this screen.

Auto-Signaling

COMMANDcomm supports a command line switch, **/n (time in seconds)**, for auto-signaling. This switch adjusts the truck polling time and is intended for use in a test environment. If the switch is not present, the default value of 60 seconds will be used.



Appendix A: Examples

This appendix contains some sample scenarios. These are common tasks that most dispatchers or order takers will eventually face.

Topics in this section:

Multiple Loads on One TruckTwo Mix Products on One Truck

Scheduling an Order out of Multiple Plants

Batching for Third Parties

Multiple Loads on One Truck

Sometimes a dispatcher needs to send a truck to two different locations on the same trip; either there's a site on the way that needs a clean-up load, or there are two small jobs fairly close together. In this case, there are two jobs that are close to one another: 20 tons of pea gravel for ABC Construction, and 25 tons of pea gravel for XYZ Construction.

The basic process is simple: "double-ticket" the truck. However, secondary issues need to be considered, as described below.

Any ticket times from signaling or dispatching are useless, so you must make a decision: ignore the times for this trip, or ask the driver to manually record his times on a note pad. Either the dispatcher or invoice prep person enters the times into the system at a later date. If you charge for excess unloading time, the driver needs to record his times. If you do not charge for excess unloading times, it may be easier to skip manual recording.

If your company uses minimum load charges, you might want to suspend those charges for these two loads.

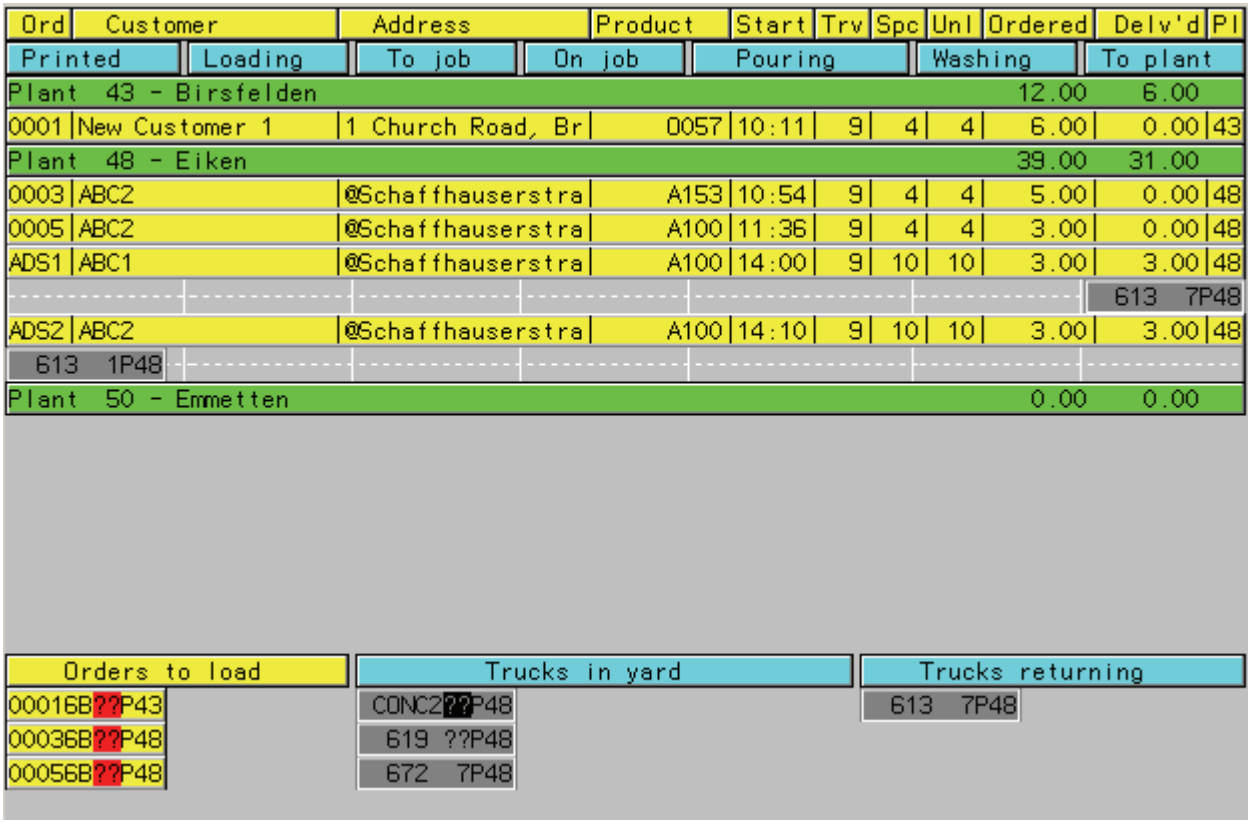
To ticket a truck hauling more than one load:

1. Follow the normal order entry process.
2. When the truck pulls up to the dispatching/batching station, drag the truck to the first order (it probably doesn't matter which). The **Ticketing** screen appears.
3. Press the **Other** button on the **Ticketing** screen. A dialog box appears, containing a number of options for this particular ticket. If you wish to disable unloading charges, de-select the appropriate box, and accept the screen.
4. Accept to ticket the truck. If you have small loads charges enabled, a dialog box appears asking if you wish to apply minimum load charges to this ticket. Select **No.** You may also receive a dialog box to warn you that **Load size is less than the Order Schedule Load Size by # UOM. Do you wish to ticket it?** Select **Yes**, and the truck is ticketed and appears on the Tracking and Scheduling screen. **Do not load the truck yet!**
5. At this point, the system has the truck assigned to the first order, and will not allow you to re-ticket it until the load has been delivered, so to trick the system into thinking that

the truck has finished (even though it hasn't even been loaded yet), drag the truck directly to the **To Plant** status.

6. Drag the truck to the second order. When the **Ticketing** screen appears, you are prompted with a dialog box that reads **`Truck is returning from order # to plant # - do you wish to ticket it now?`** Click **Yes**. Double-check the ticket information and press <F2> to ticket the truck.
7. The **Tracking and Scheduling** screen now looks something like this:

Tracking & Scheduling


Ord Customer Address Product Start Trv Spc Unl Ordered Delv'd Pl
Printed Loading To job On job Pouring Washing To plant
Plant 43 - Birsfelden 12.00 6.00
0001 New Customer 1 1 Church Road, Br 0057 10:11 9 4 4 6.00 0.00 43
Plant 48 - Eiken 39.00 31.00
0003 ABC2 @Schaffhauserstra A153 10:54 9 4 4 5.00 0.00 48
0005 ABC2 @Schaffhauserstra A100 11:36 9 4 4 3.00 0.00 48
ADS1 ABC1 @Schaffhauserstra A100 14:00 9 10 10 3.00 3.00 48
613 7P48
ADS2 ABC2 @Schaffhauserstra A100 14:10 9 10 10 3.00 3.00 48
613 1P48
Plant 50 - Emmetten 0.00 0.00
Orders to load
00016B??P43
00036B??P48
00056B??P48
Trucks in yard
CONC2??P48
619 ??P48
672 7P48
Trucks returning
613 7P48

8. The black box where the truck number is usually displayed indicates that the truck has already been ticketed to a second order—so that the dispatcher will not try to ticket the truck to a third order. But the system thinks that these two orders are two separate trips. Drag the truck back to the yard. As soon as this is done, the truck will immediately appear on the second order.

   The truck can now be loaded with the total yardage for the two jobs, and go on its way.
9. Using this method, ticket times must be given extra attention. While the system records times as the truck goes through the delivery cycle, all those times are assigned to the second ticketed order—remember, as far as the system is concerned, the first order is already delivered. Similarly, the dispatcher needs the driver to manually alert him as he gets to the different jobs.
10. If you charge for excessive unloading time, require the driver to manually record the time he arrived on site, started pouring, and started to wash out. Those times will then need to be entered manually through **Edit Orders and Tickets**.

Two Mix Products on One Truck

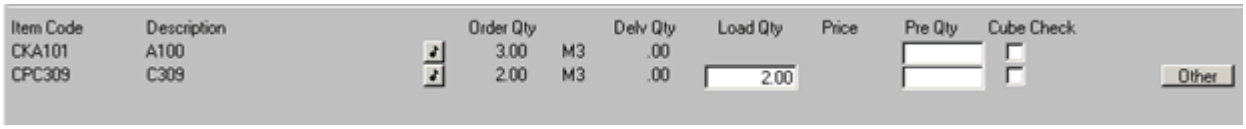
Sometimes a dispatcher needs to send one truck to a location with two different mixes on board. This is possible when deliveries are over short distances and the truck doesn't have to continue to turn the mixer. Typically, the second product will be a pump-priming mix that can be unloaded first.

The process used to order, load and deliver two products on one truck is very simple. The order is set up as usual with two different products, and upon ticketing, two tickets are created and sent to the batch panel.

To load and ticket two products on one truck:

1. Follow the usual order entry process, selecting two different mixes and entering a schedule.
2. Open **Concrete Ticketing & Shipping** {Dispatch > Concrete Ticketing & Shipping}.
3. The **Order Date** defaults to the current date. If necessary, you can change this once a plant code has been entered.
4. Enter the **Plant Code** of the order you just created.
5. Select a **Truck Code**.
6. If a driver was not automatically assigned, detail on the **Driver Code** field and select a driver from the list.
7. Enter the **Order Code** of the order you just created.
8. At this stage you can see details for both products, but only the **Load Quantity** of the first product is editable.
9. Press the **Add** button at the bottom of the screen. This adds a new ticket and places the cursor in the **Order Code** field. Detail on the field and select the same order as previously. Tab through the **Ticket Code** field.
10. The screen now displays the **Load Quantity** for the second product on the order. You can scroll between the first and second products using the **Previous/Next** buttons.

Concrete Ticketing & Shipping (EDTSHIP) - Second product on one truck



The second product must have a load quantity less than or equal to the truck's maximum load, minus the load quantity of the first product.

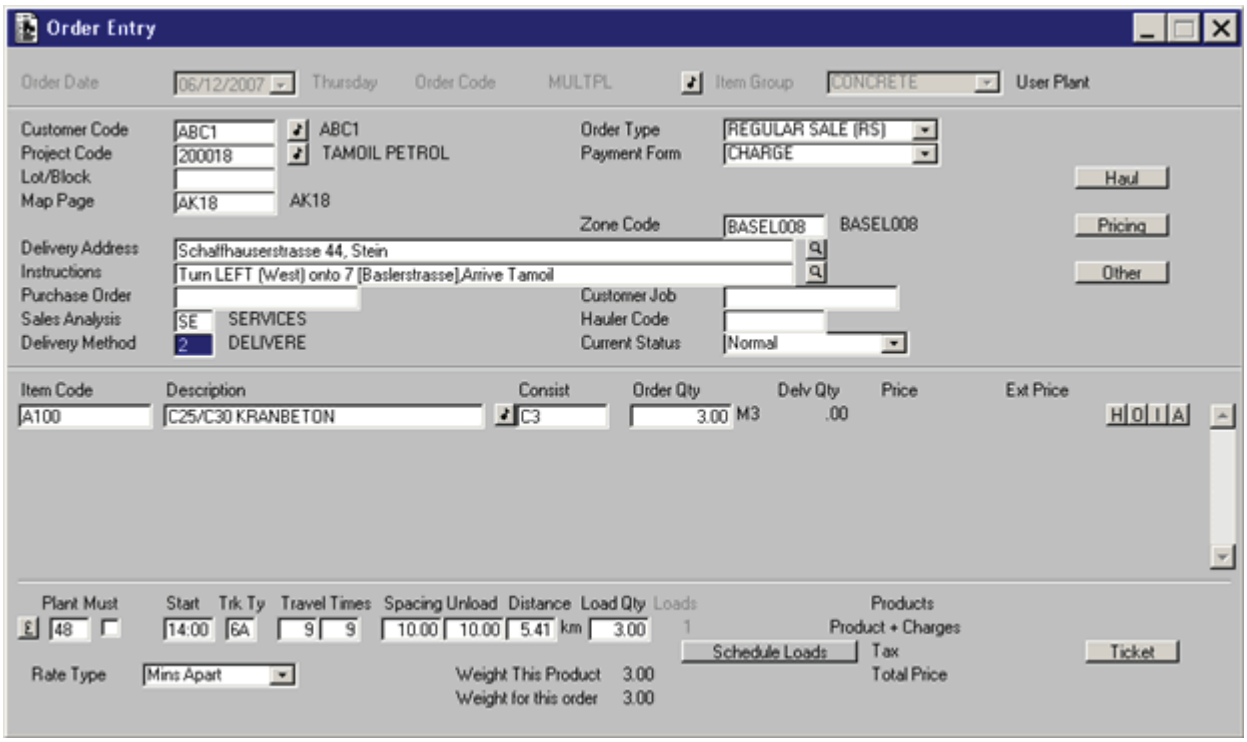
11. The **Journey** field is now read-only and displays the **Unique Identifier** field, which always reads '**##**'.
12. Press <F2> to accept the screen and save the changes. Two tickets are created and sent to the batch panel.
13. You may be prompted with messages relating to charges, such as minimum load and sundry charges. Respond to these prompts appropriately.

Scheduling an Order out of Multiple Plants

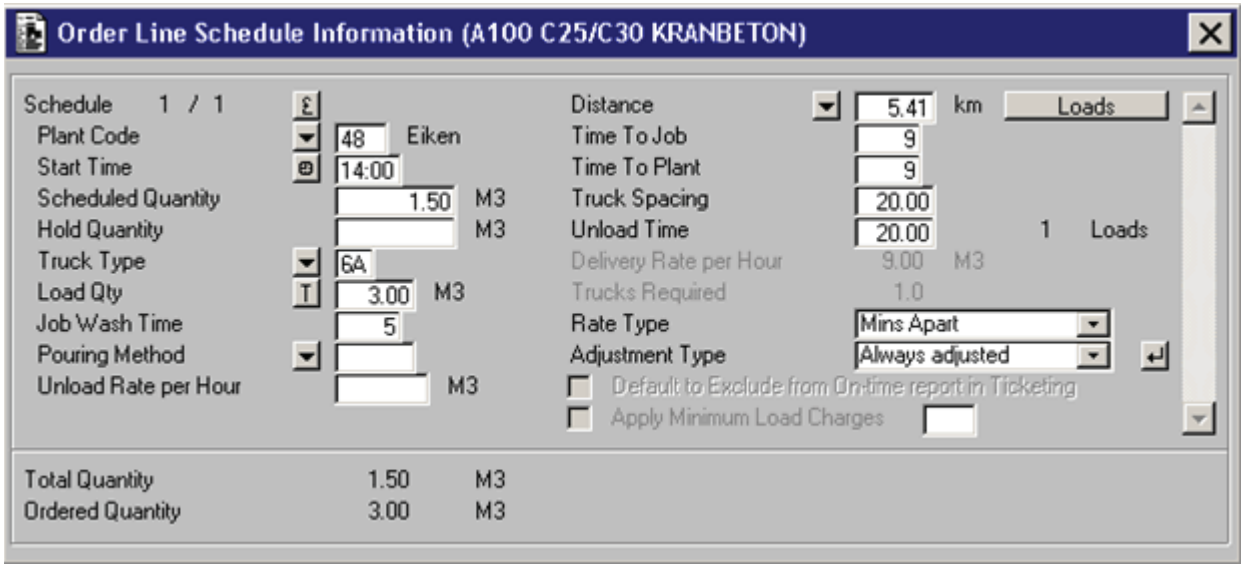
Sometimes it is necessary to deliver an order out of two or more plants, either because of the sheer quantity of material being delivered, or because of prior scheduling commitments. Multiple-plant scheduling is easy to accomplish in COMMANDseries, although you do need to work out a couple of details beforehand. Let's say that we have a 3 M3 order that we want to split between two plants. The customer wants the first load to arrive at 2 P.M., with 10-minute truck spacing. To make life a little easier, we'll alternate trucks from the two plants.

1. Set up the primary order screen normally.

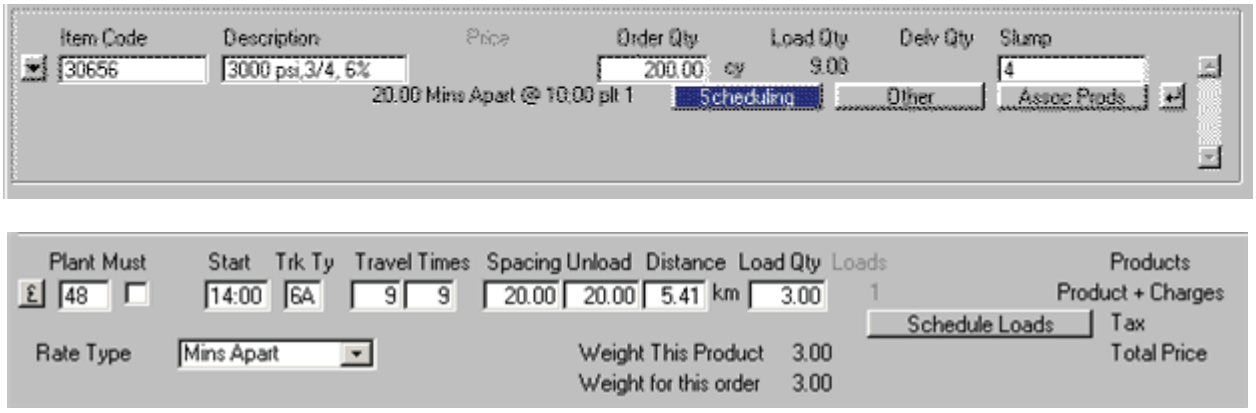
Order Entry (EDTCORD)



2. When you get to the schedule screen, enter the plant number and start time. The next field is the **Scheduled Quantity**. Normally, the total order amount defaults into this field; however, we will only be delivering 1.5 M3out of this plant. Enter `1.5` and tab through.


Order Line Schedule Information (A100 C25/C30 KRANBETON)
Schedule 1 / 1
Plant Code 48 Eiken
Start Time 14:00
Scheduled Quantity 1.50 M3
Hold Quantity M3
Truck Type 6A
Load Qty 3.00 M3
Job Wash Time 5
Pouring Method
Unload Rate per Hour M3
Distance 5.41 km
Time To Job 9
Time To Plant 9
Truck Spacing 20.00
Unload Time 20.00 1 Loads
Delivery Rate per Hour 9.00 M3
Trucks Required 1.0
Rate Type Mins Apart
Adjustment Type Always adjusted
Default to Exclude from On-time report in Ticketing
Apply Minimum Load Charges
Loads
Total Quantity 1.50 M3
Ordered Quantity 3.00 M3

3. At the bottom of the schedule screen, the **Total Quantity** field will indicate that you currently have only half of the order scheduled for delivery. COMMANDseries will not accept any order until the total ordered quantity has been scheduled for delivery.
4. Select a **Truck Type**. Enter distance and travel time as necessary.
5. This brings us to the **Truck Spacing** field. They want 10-minute spacing, but we want to alternate trucks between the two plants. That means that for the plant 1 schedule, we need a truck spacing of 20 minutes. Enter the truck spacing.
6. Press the **Add Occurrence** button or <F6>. It will look as though the schedule form has cleared, but if you look at the upper left corner you will see that it now reads **`Schedule 2`**. Now, enter the delivery schedule for the second plant. (If you need to refer to Schedule 1, use the scroll bar on the right side of the form to move back and forth between the two schedules).
7. Enter **`Plant 2`** for the plant. Next is the start time. The first load (which we scheduled out of plant 1), arrives at 2 P.A.M., and they want 10-minute spacing. So, we'll schedule first load out of the second plant for ten minutes later, 14:10.
8. The Scheduled Quantity will default to the remaining unscheduled order quantity, in this case, 1.5 M3. At the bottom of the form, the ordered quantity now matches the scheduled quantity.
9. Enter the **Distance** and **Travel Time**. In most cases, these values will not be the same as for Plant 1. If these values are not accurate, the 10-minute truck spacing will not be maintained.
10. Press <F2> to save the schedule and return to the main order screen. Note that the schedule summary only displays information for the first schedule.

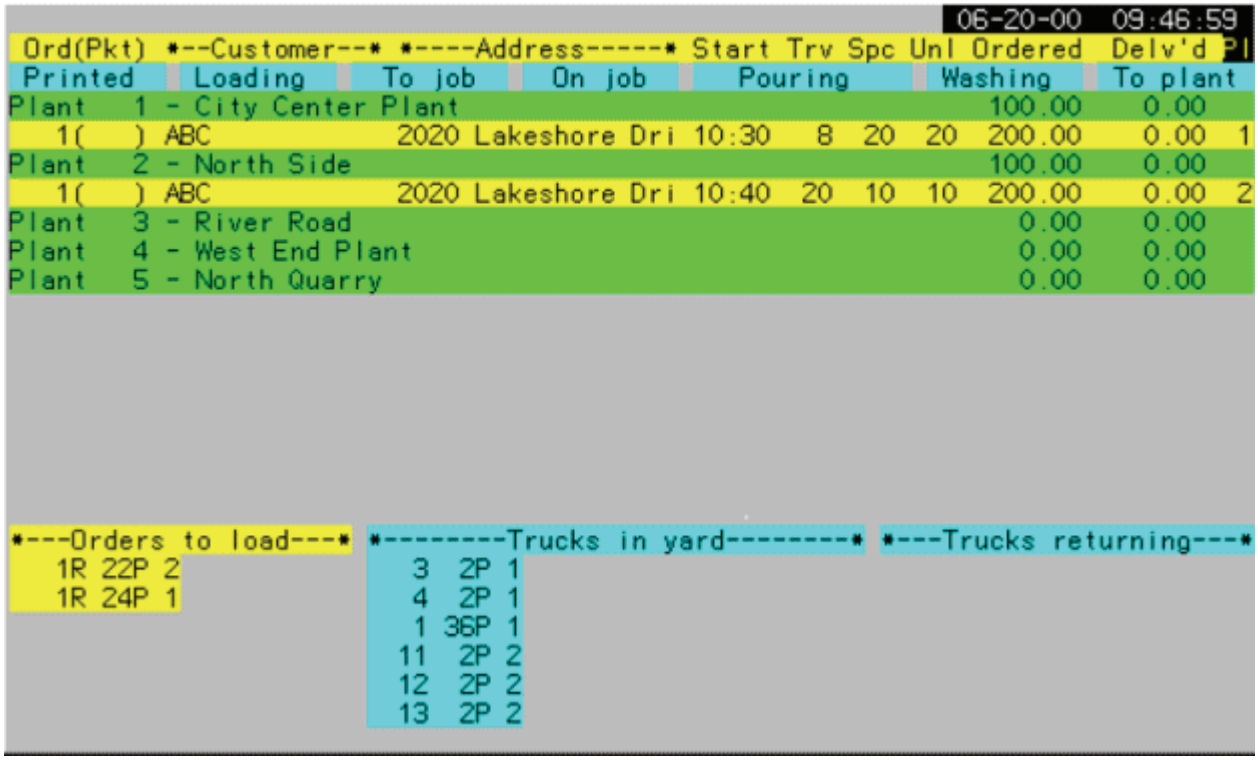


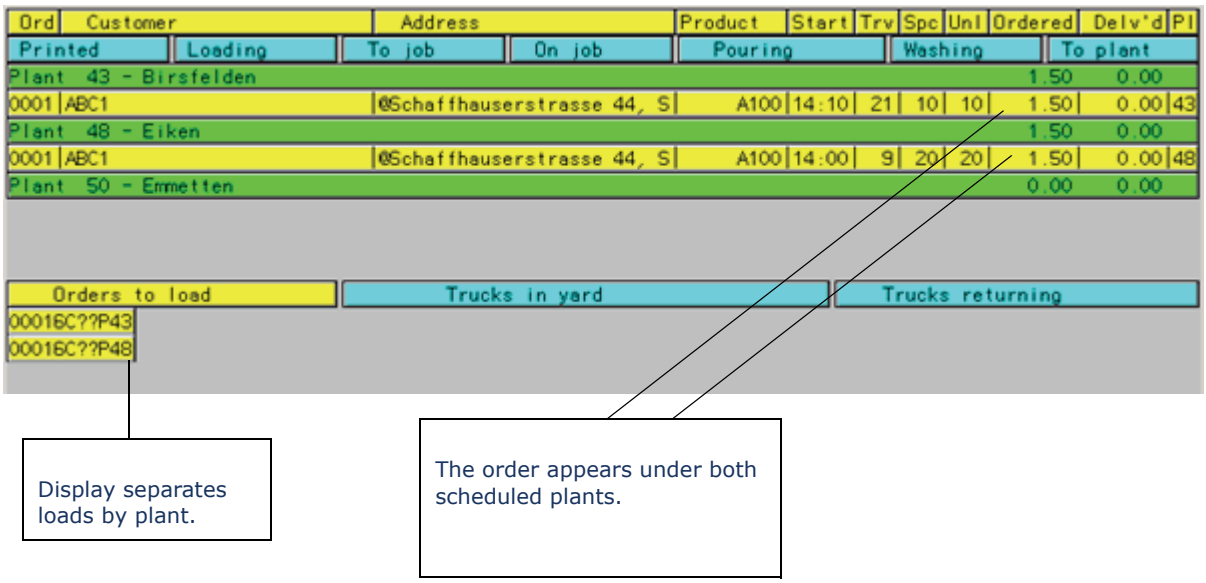
11. Press <F2> again to save the order.

OK, the Order's in the System. Now What?

Now that the order has been scheduled, let's talk about what the dispatcher will see and do on the **Tracking and Scheduling** screen.

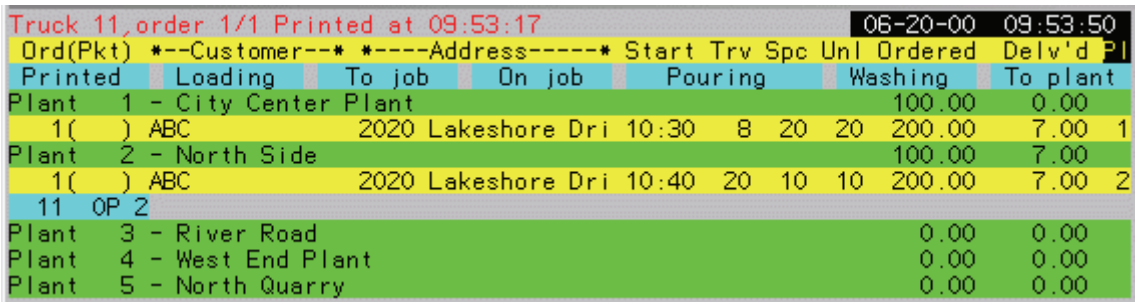
Here's what the **Tracking and Scheduling** screen will initially look like. Both the plant and order summary lines show the amount scheduled out of that plant. Note that because of the difference in travel times, the first truck from plant 43 is scheduled to be loaded before the first one from plant 48, even though the truck from plant 48 will be the first to arrive on site.


06-20-00 09:46:59
Ord(Pkt) *--Customer--* *----Address-----* Start Trv Spc Unl Ordered Delv'd Pl
Printed Loading To job On job Pouring Washing To plant
Plant 1 - City Center Plant 100.00 0.00
1( ) ABC 2020 Lakeshore Dri 10:30 8 20 20 200.00 0.00 1
Plant 2 - North Side 100.00 0.00
1( ) ABC 2020 Lakeshore Dri 10:40 20 10 10 200.00 0.00 2
Plant 3 - River Road 0.00 0.00
Plant 4 - West End Plant 0.00 0.00
Plant 5 - North Quarry 0.00 0.00
---Orders to load---
1R 22P 2
1R 24P 1
--------Trucks in yard--------
3 2P 1
4 2P 1
1 36P 1
11 2P 2
12 2P 2
13 2P 2
---Trucks returning---


Ord Customer Address Product Start Trv Spc Unl Ordered Delv'd Pl
Printed Loading To job On job Pouring Washing To plant
Plant 43 - Birsfelden 1.50 0.00
0001 ABC1 @Schaffhauserstrasse 44, S A100 14:10 21 10 10 1.50 0.00 43
Plant 48 - Eiken 1.50 0.00
0001 ABC1 @Schaffhauserstrasse 44, S A100 14:00 9 20 20 1.50 0.00 48
Plant 50 - Emmetten 0.00 0.00
Orders to load
Trucks in yard
Trucks returning
00016C??P43
00016C??P48

Display separates loads by plant.

The order appears under both scheduled plants.


Truck 11,order 1/1 Printed at 09:53:17
06-20-00 09:53:50
Ord(Pkt) *--Customer--* *----Address-----* Start Trv Spc Unl Ordered Delv'd Pl
Printed Loading To job On job Pouring Washing To plant
Plant 1 - City Center Plant 100.00 0.00
1( ) ABC 2020 Lakeshore Dri 10:30 8 20 20 200.00 7.00 1
Plant 2 - North Side 100.00 7.00
1( ) ABC 2020 Lakeshore Dri 10:40 20 10 10 200.00 7.00 2
11 OP 2
Plant 3 - River Road 0.00 0.00
Plant 4 - West End Plant 0.00 0.00
Plant 5 - North Quarry 0.00 0.00

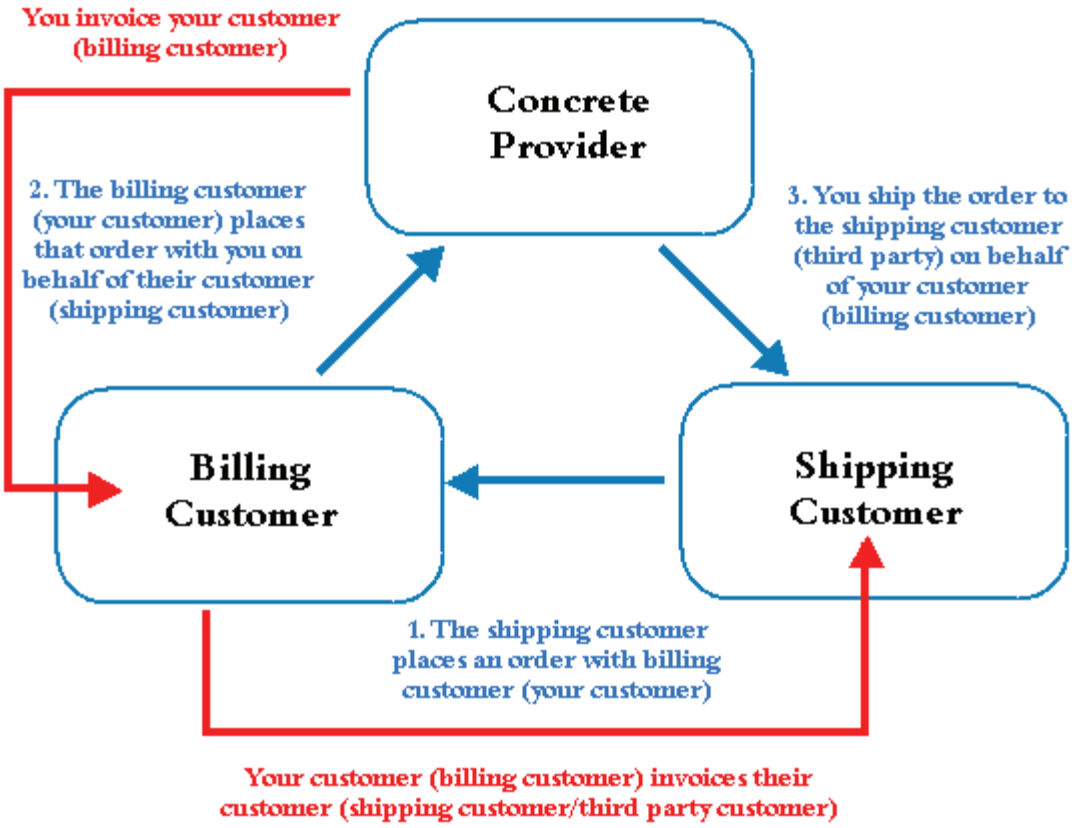
Batching for Third Parties

It is often the case in the concrete industry that the customer that places an order with you - the concrete provider - is not always the customer that receives the order.

By setting up third party companies it is possible for your customers to order from you on behalf of one of their customers, so in effect, a third party customer is defined as a customer of your customer.

COMMANDseries also allows you to set up different document formats to print tickets with your customer's logo, to give to the third party customer. A different ticket sequence can also be set up to differentiate between normal and third party tickets.

Third Party Batching Process


You invoice your customer (billing customer)
Concrete Provider
2. The billing customer (your customer) places that order with you on behalf of their customer (shipping customer)
3. You ship the order to the shipping customer (third party) on behalf of your customer (billing customer)
Billing Customer
Shipping Customer
1. The shipping customer places an order with billing customer (your customer)
Your customer (billing customer) invoices their customer (shipping customer/third party customer)

The diagram illustrates the third party batching process. In COMMANDseries, third party batching is managed through customers and projects.

The **Ticket/Weights Data Out** screen {Invoicing > Ticket/Weights Data Out} has also been modified to provide the ability to export tickets for specific customers or customer ranges, where before it allowed only date and ticket code ranges.

Topics in this section:

Third Party Customers

Third Party Customer Projects

Third Party Company Document Formats

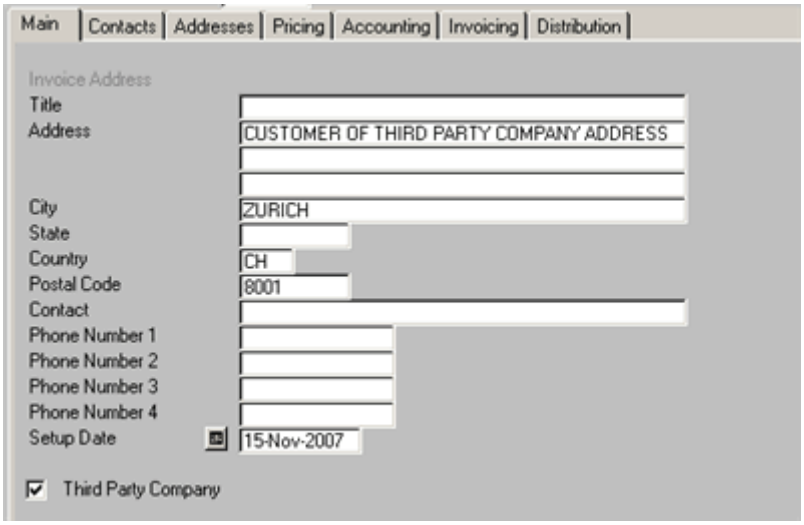
Third Party Customers

A third party customer must be set up as a valid customer in COMMANDseries and then flagged as a third party company. You then reference that customer within a project set up for the billing customer.

To set up a third party customer:

1. In order to use third party batching, the **Use Multiple Customer Codes** checkbox on the System tab of the **Configuration** screen {Files > General Information > Configuration} must be checked.
1. Open the **Customer** screen. {Files > Customer & Project Information > Customers}
2. Detail on the **Customer Code** field to select an existing customer. To add a new customer enter an appropriate customer code and create a customer in the usual way.
3. Check the **Third Party Company** check box at the bottom of the Main tab.

Customers screen (EDTCUST)- Main tab - Third Party Company



4. Press <F2> to accept the screen to save the changes.

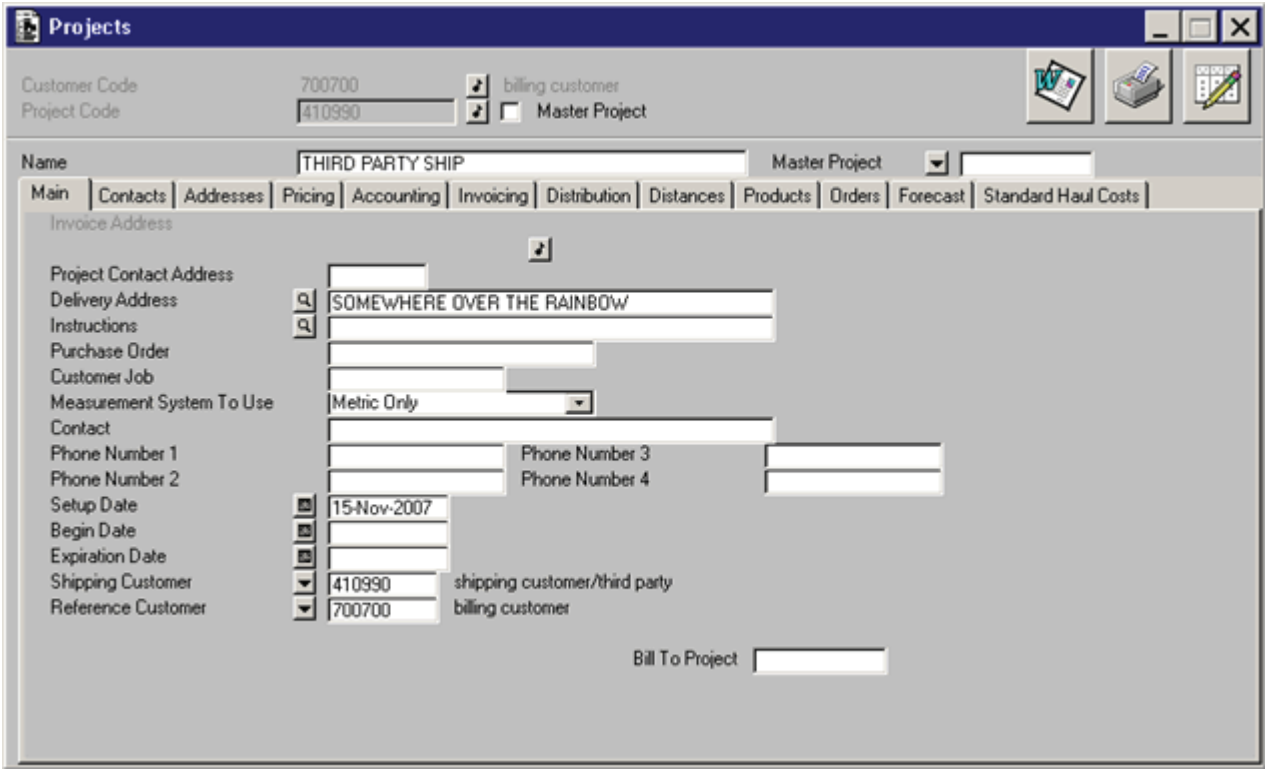
Third Party Customer Projects

In order to achieve third party business, you must set up a project for the billing customer, that references the billing customer.

To set up a project for a third party customer:

1. Open the **Projects** screen. {Files > Customer & Project Information > Customers}
2. Detail on the **Customer Code** field and select your customer - the billing customer - from the list.
3. Tab through the **Project Code** field or enter a unique project code.
4. Continue to enter project details in the usual way.
5. Detail on the **Shipping Customer** field and select a third party company from the list.
6. The **Reference Customer** will typically be the same as the billing customer. Detail on the field to select from the list, or enter the customer code.

Projects screen - (EDTPROJ) - Main tab - Third Party Project



7. Press <F2> to accept the screen and save the changes.

   For a normal order, when you detail on the **Project** field in **Order Entry** the list shows projects for the billing customer, since the shipping customer and the billing customer are the same person. When the **Use Multiple Customer Codes** checkbox on the System tab of the **Configuration** screen {Files > General Information > Configuration} is checked, detailing on the Project field in Order Entry lists the projects for the shipping customer. This means that when creating a third party order, you should enter the shipping customer in the Customer Code field.

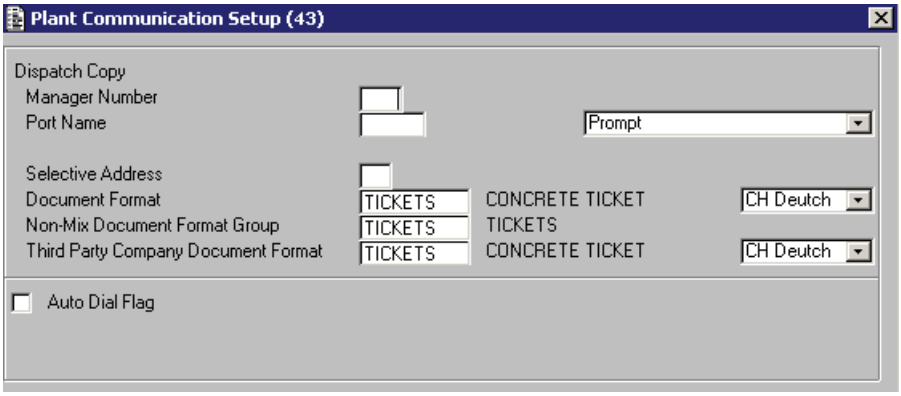
Third Party Company Document Formats

COMMANDseries also allows you to specify additional document formats to use for tickets provided to third party customers. This means that the ticket delivered to the third party customer can display the logo of your customer. This enables you to use the billing customer's own ticket formats.

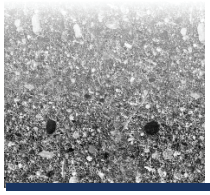
To set up a third party company document format:

1. Go to the **Plants** screen. {Files > Plant & Delivery Information > Plants}.
2. Enter the **Plant Code** of the plant you wish to define the document format for, or detail on the field to select one from the list.
3. Go to the **Communications** Tab and ensure the **Print Dispatch Copy** checkbox is checked.
4. Press the **Setup** button on this line to open the **Plant Communication Setup** screen. The plant code is displayed in the title bar of the screen in parenthesis.

Plant Communication Setup (EDTPLNTA)



5. Ensure that a **Document Format** and **Non-Mix Document Format Group** are defined, as these are mandatory fields and are specific to your document formats.
6. Enter the third-party document format into the **Third Party Company Document Format** field, or detail to select one from the list.
7. Press <F2> to accept the screen and save the changes. Press <F2> again to accept the Plants screen. This document format will now be used for third party tickets from the specified plant.



Appendix B: Credit Checking

Topics in this section:

Credit Checking Overview
Credit Checking Configuration
Using the Credit Checking Function

Credit Checking Overview

Credit Checking is a comprehensive component of the accounting system that helps keep Accounts Receivable at a manageable level. Credit Checking helps prevent shipment of orders to customers who have overdue balances or some other kind of limit on their account. COMMANDseries supports two levels of credit checking:

Standard (no license needed)

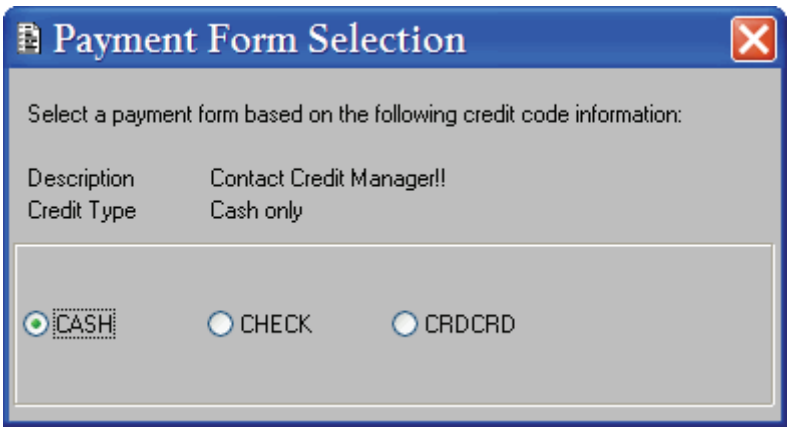
Each customer is assigned a credit code. Each credit code can be set to one of four Credit Types:

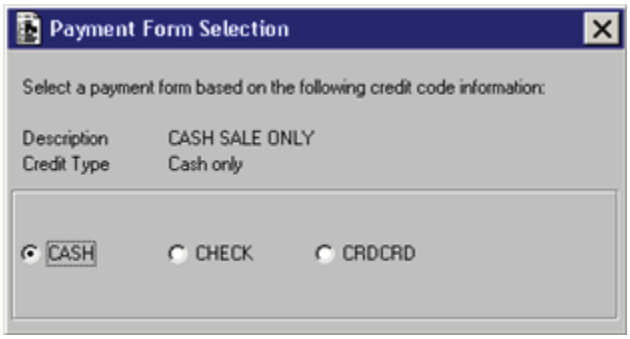
- Cash Only
- Charge Only
- Charge or Cash
- No Sale

Once a customer or customer/project has been entered, the system retrieves the appropriate credit code, and the order screen will respond accordingly:

Cash Only – The **Payment Form Selection** screen will display, allowing selection of payment method. If the credit code is flagged to Display Credit Code Description, the description will appear in the top of the **Payment Form Selection** screen.

Payment Form Selection (EDTSLPF)





Charge Only – The system will simply proceed with the standard order entry process. The order will be invoiced under regular business practices. If the credit code is flagged to **Display Credit Code Description**, the description will appear in a dialog box.

Cash or Charge – The **Payment Form Selection** screen will display, allowing selection of payment method.

No Sale – The **Credit Code Description** will be displayed in a dialog box. No orders can be entered for a customer with such a credit code.

Warning screens pop up when specific situations occur in order entry. Depending on how credit is set up for individual customers, different types of warning screens appear. Remember, whether or not warning screens appear depends on how the customer's credit code and credit type is set up in the customer file.

You may want to create multiple No Sale credit codes to cover different situations. For example:

- No Sale - Contact Credit Manager
- No Sale - Customer Account is Retired

When using this credit method, it's important to understand that the system doesn't pay any attention to the customer balance; all that matters is the credit type of the customer's assigned credit code.

Credit Checking (licensed feature)

Full Credit Checking is a licensed option in COMMANDseries. This feature will actively review a customer's full balance whenever an order is entered or a ticket is printed, and will approve or hold the order based on the credit limit established in the customer's assigned credit code.

Credit Checking Configuration

To use Credit Checking, credit codes and reason codes must be set up in COMMANDseries. Do not assume that relevant credit codes and reason codes were set up when the system was initially configured.

Topics in this section:

Credit Codes

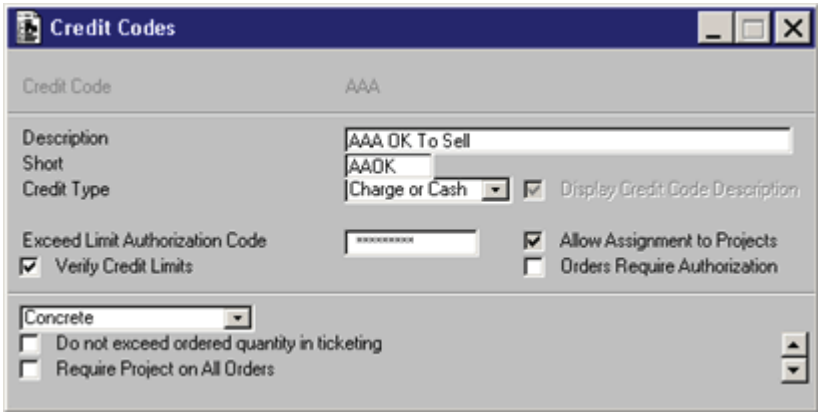
Reason Codes

Assigning Customer Credit Codes

Credit Codes

You can build credit codes that are relevant to Credit Checking using the credit codes screen {Files > Customer and Project Information > Credit Codes}. You can then verify credit limits on codes that require credit supervision; you needn't verify the credit limits on customers whose credit code reads **`AAA OK To Sell`**, for example. Customers assigned that credit code generally do not need credit supervision.

Credit Codes (EDTCRED)



To build a credit code:

1. Enter a new **Credit Code**. Choose a number or letter combination that is not already in use in the credit codes file.
2. Enter the **Description** of the new credit code. This field fully describes, or names the credit code. The code should have a clear and direct relationship to Credit Checking.
3. Enter a **Short** description of the new credit code. The short description appears on screens and reports where the Description will not fit.
4. Enter the **Credit Type**. This field identifies the credit type assigned to the credit code. Following is a list of credit types.
   - **Cash only** – Only cash may be received from this customer
   - **Charge only** – Only charge orders are allowed for this customer
   - **Charge or cash** – C.O.D. or charge orders may be taken for this customer
   - **No sale** – No orders of any kind can be taken for this customer. Tickets on orders already established will not be generated
5. Enter the **Exceed Limit Authorization Code**. This code releases a flagged order authorized by the credit department. Privileged users should change this code each time it is used.
6. Check the **Verify Credit Limits** checkbox if this particular credit code needs authorization from the credit department to proceed with the order.
7. To make the new credit code available to projects, mark the **Allow Assignment To Projects** checkbox.
8. To specify that when using this credit code **Orders Require Authorization**, mark the checkbox.
9. The product line field coordinates with the following **Do not exceed** and **Require Project** checkboxes. The field defaults to **Concrete**; set the product line as necessary, then proceed to the following checkboxes.
10. Check the **Do not exceed ordered quantity in ticketing** checkbox to ensure the delivered quantity of product does not exceed the ordered/ticketed quantity of product.
11. Check the **Require Project for all Orders** checkbox, if necessary.
12. To modify other product lines, change the product line field to the appropriate product and repeat Steps 9 and 10 above.

Reason Codes

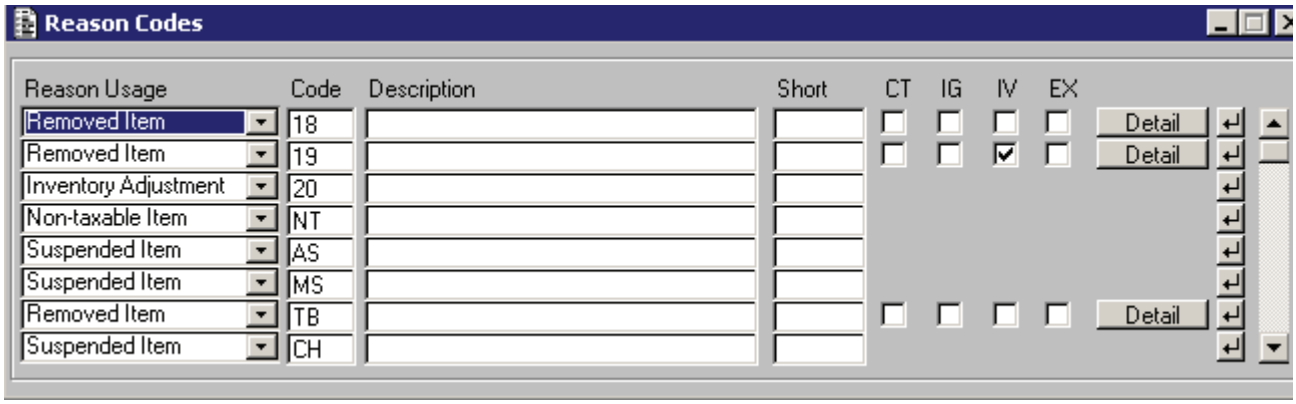
You can build Reason Codes that are relevant to Credit Checking using the Reason Codes seditor {Files> General Information > Reason Codes}. The Reason Codes editor lets you access reason codes that explain the reasoning behind setting another field to a particular value. For instance, a non-taxable reason code is used in the Customers function to tell why a particular customer is set to a non-taxable status. The non-taxable flag field indicates whether customers are non-taxable. If they are non-taxable, the reason code tells why.

Following is a list of reason types relevant to credit checking; Credit Checking is most likely related to A/R Balance Remaining.

- **Removed Item** - Order or ticket has been removed or canceled
- **Suspended Item** - Order or ticket has been suspended from invoicing

- **Non-taxable Item** - Customer/project/order is set to non-taxable status
- **A/R Balance Remaining** - A balance remains for an invoice that has some A/R transaction applied to it.

Reason Codes (EDTRSNC)



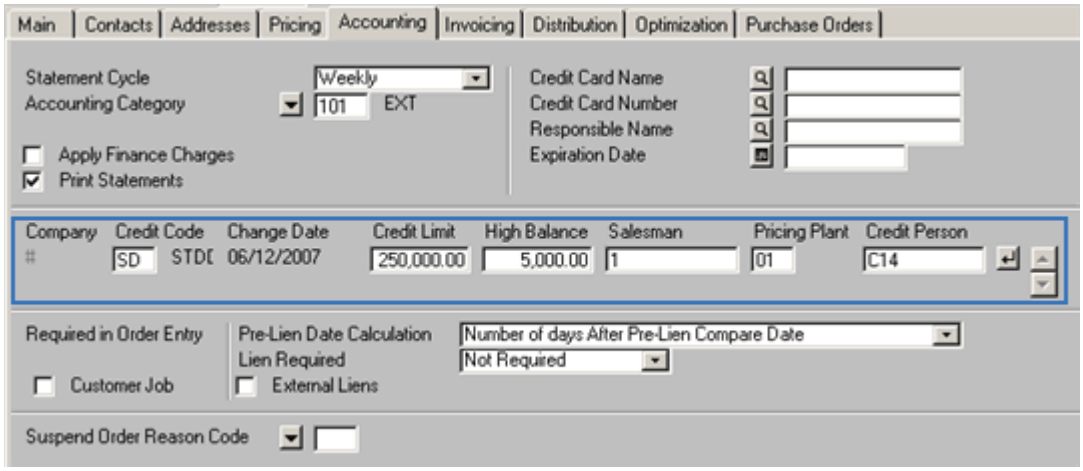
To build a reason code:

1. Select a **Reason Usage** from the drop-down list.
2. Enter the **Reason Code**. Use a number that is not already assigned to another reason.
3. Enter a **Description**.
4. Enter a **Short** description.
5. Select which COMMANDseries module the reason code should apply to.
6. Click on the **Add Occurrence** button to make another entry.

Assigning Customer Credit Codes

Customers who require constant credit supervision need their customer file updated to indicate their credit needs before Credit Checking can run effectively. Several fields in the Customer File require data to initiate Credit Checking: **Credit Code**, **Credit Limit**, **High Balance**, **Salesman, Pricing Plant,** and **Credit Person**.

Customer Accounting tab (EDTCUSTG)



To assign customer credit codes:

1. Access the **Accounting** tab on the Customers editor {Files > Customer & Project Information > Customers > Accounting}.
2. Enter the appropriate Credit Checking **Credit Code**. Detail on the field if necessary.
3. Enter the customer's credit limit. Any new order exceeding that balance will be flagged with a warning screen if **Verify Credit Checking** is selected on the Credit Codes screen.
4. Enter the customer's **High Balance**. This is the highest balance a customer has accumulated. It is updated by the COMMANDreceivables application when an invoice is posted to the customer's account and a new high balance is reached.
5. If you maintain credit by company, i.e., your system is set up so that different companies have different credit codes, a **Salesman** and **Pricing Plant** can also be defined. This is also useful if two different companies use the same credit code, but a different salesman and pricing plant. Detail on the fields to select appropriate entries. This information will then be used when creating orders. If these fields are left blank you will be forced to enter them when entering an order. If you do not maintain credit by company, i.e., the company code is entered as **#** the salesman and pricing plant fields can be left blank.

   It is only possible to maintain credit by company if the **Maintain Credit by Company** flag on the **Receivables** tab of the **Configuration** screen {Files > General Information > Configuration} is checked, and this must be done at the time of set up.
6. Enter the **Credit Person**. Assign this number to the employee who is responsible for credit matters with customers. The selected employee must be contacted by Dispatch for credit authorization and the **Exceed Limit Authorization Code**.

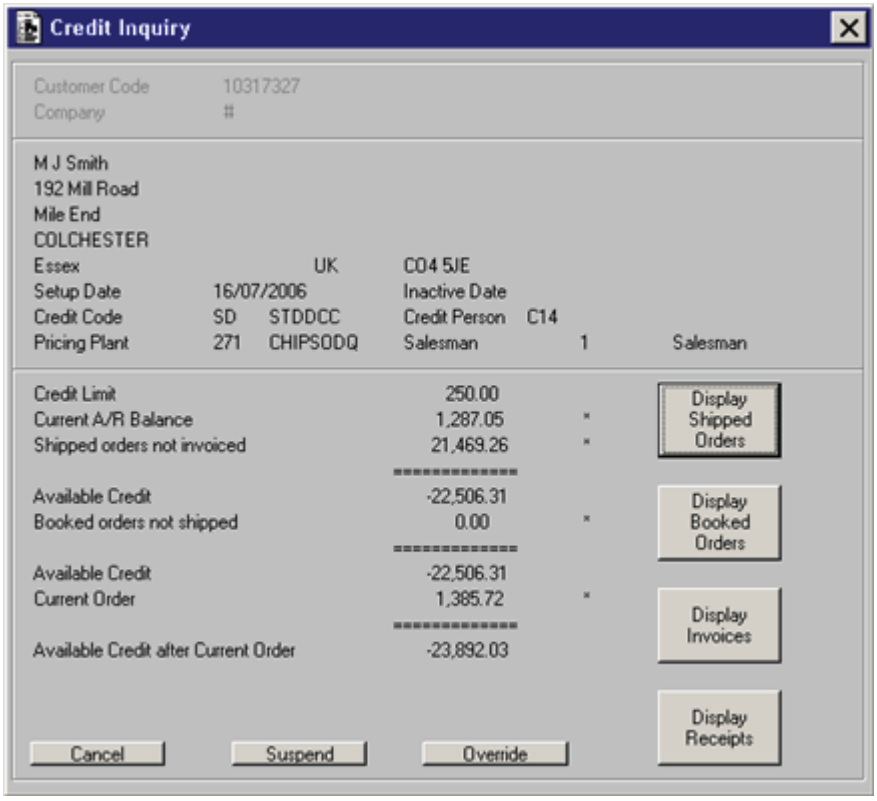
Using the Credit Checking Function

Once the credit codes and the customer files are updated, Credit Checking begins to function.

Credit Alert

When dispatch enters an order that exceeds the credit limit of a particular customer, the **Credit Inquiry** screen will appear before the system will accept the order. The dispatch person can display shipped orders, booked orders, invoices and/or receipts using the buttons, but ultimately has three options, **Cancel**, **Suspend**, or **Override**.

Credit Inquiry (SYSCREX)



Select one of the following options:

- Click the **Cancel** button to cancel the order.
- Click the **Override** button to enter the Credit Override Authorization code. Dispatch then calls the credit person responsible for supervising this customer's credit needs to get the password or phrase.

Credit Override Authorization (SYSCREX1)

- Click **Suspend Order** if the credit department is unreachable and it becomes necessary to suspend the order until authorization is provided. Enter the **Suspend Order Reason Code**. Dispatch can return to that order at a later time without having to re-enter the order.

Warning Screens

Warning screens pop up when specific situations occur in order entry. Depending on how credit is set up for individual customers, different types of warning screens appear. Remember, whether or not warning screens appear depends on how the customer's credit code and credit type is set up in the customer file.

If the customer's account is in dispute for any reason, such as the customer disputes the price or requires payment before new delivery, the following message appears:

```
Do not sell
```

If the customer's account is C.O.D. only, the following message appears:

```
COD only!
```

If the customer code is retired, the message below appears. It may be necessary to assign the customer a new code, or perhaps an incorrect customer number was entered initially.

```
Customer code has been retired!
```

Message	Meaning
Cash only	The customer is a cash only customer. Only cash-related payment methods (Cash, Check, Credit Card) will be allowed.
Call Credit Department	The customer's account requires constant supervision by the Accounting Department. **Note:** This message is a variation on the Cash Only code. It does not prevent an order from being placed, nor does it force the order taker to call the credit department before proceeding.
COD Only	Another Cash-Only variant
Do Not Sell	If a customer has a Do Not Sell credit code, the system will not accept an order for the customer.
Customer Code has been retired!	A Do Not Sell variant. Provides the order taker with additional information.

Appendix C: Order-Level Mix Design

Order-level mix design lets you modify a mix design at the order level, without changing the base mix design stored in the item file. To use this feature, users must have the necessary flags set in the User editor. Additional settings for the feature are located on the Configuration editor's **Distribution** tab. Please refer to the *Setting up the System* manual for additional information on these screens.

The basic functioning of this feature is controlled by settings in the Configuration and User files. The Configurations setting specifies if the feature is to be used at all, while the User-level options {Files > System > Users > Options} determine what specific privileges any given user has with regard to this feature. The two User-level options are:

- **Allow Access to Order-level Mix Design** - This flag lets a user enter a mix design at the order level.
- **Allow Override of Unapproved Mix Designs in Tickets** - This flag gives a user the ability to ticket loads with unapproved mix designs.

Note: Dispatch can only ship approved mixes. The ticket screen will reject unapproved mixes, unless the user is flagged to allow override of non-approved mixes.

Please Consult the *Setting Up the System* manual for additional information.

The business process for using Order-level Mix design will vary based on companies' needs and hardware. Of particular importance to the process is whether the company has either a batch interface or a third-party QC program.

Regardless of your specific business practices, it is important to determine how many days the QC process will take, and make sure that orders are taken far enough in advance that the mixes can be approved by QC.

The following are some possible scenarios:

No Batch Interface, No 3rd Party QC

1. Orders are entered with mixes attached.
2. QC runs the Order Mix Design report for approved and non-approved mixes.
3. QC reviews, edits, and approves the mixes on the order. If a mix cannot be approved, the customer is notified, and an alternate mix design is worked out.
4. The approved mix is dispatched normally.

Batch Interface & 3rd Party QC

1. Export the mixes to a mix design output file.
2. Import that file into the 3rd party QC program.
3. Edit as necessary.

4. Import corrected mix design file back into COMMANDseries.
5. Download mixes to batch panel. The mixes are now ready to be dispatched.

Batch Interface, No 3rd Party QC Program

1. Orders are entered with mixes attached.
2. QC runs the Order Mix Design report for approved and non-approved mixes.

   Note: The Order Mix Design Report is available under the Dispatch option in COMMANDconcrete. It shows what Order Level Mix Designs have been approved or not approved.

3. QC reviews, edits, and approves the mixes on the order. If a mix cannot be approved, the customer is notified, and an alternate mix design is worked out.
4. Download mixes to batch panel. The mixes are now ready to be dispatched.

Topics in this section:

Order-Level Mix Design
Mix Design Interface - QA
Ticketing

Order-Level Mix Design

The Order-level Mix Design feature lets users with appropriate access design a mix from the Order Entry screen. This mix design will be available only for the current order. This functionality is useful when it is necessary to work around specific restraints, such as weather conditions and loading times.

To set up Order-Level Mix Design:

In order for a user to be able to use order-level mix design, two system flags must be set:

1. Open the Distribution tab of the Configuration screen {Files > General Information > Configuration}. Select **Allow Order Level Mix Design** to activate the feature at a system level.
2. The **Default Mix Design Approval Status** flag determines the operational requirements of the feature. Select one of the following options:
   - **`Mix Not Approved`** (the most common selection) - The system will not ship the mix until someone with appropriate system privileges retrieves the order, opens the Order Line Mix Design screen, and checks the **Mix Design Approved by Quality Control** box.
   - **`Mix Design Approved`** - Modified mix design can be shipped immediately.

Configuring Order-level Mix Design

Allow Order Level Mix Design
Default Mix Design Approval Status
Mix Design Not Approved
Mix Design Not Approved
Mix Design Approved
Generic Location for Mix Conversion

3. **Accept** the configuration settings
4. Open the Options tab on the Users editor {Files > System Information > Users > Users}.
5. Select **Allow Access to Order Level Mix Design** to let a given user use the feature.

Warning!

If you use Order-level Mix Design, you must ensure that anyone authorized to enter order-level mix designs is qualified to do so as the design might not be reviewed prior to shipment!

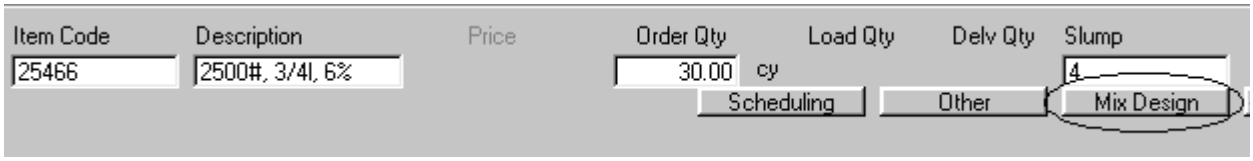
Please refer to the *Setting up the System* manual for additional information on configuring these two flags.

Once the system has been set up for order-level mix design, you are ready to edit a mix from the Order Entry screen.

To perform order-level mix design:

1. Open the Order Entry screen and create an order as normal.
2. When the system is set up for order-level mix design, the **Associated Products** button on the main Order Entry screen becomes the **Mix Design** button.

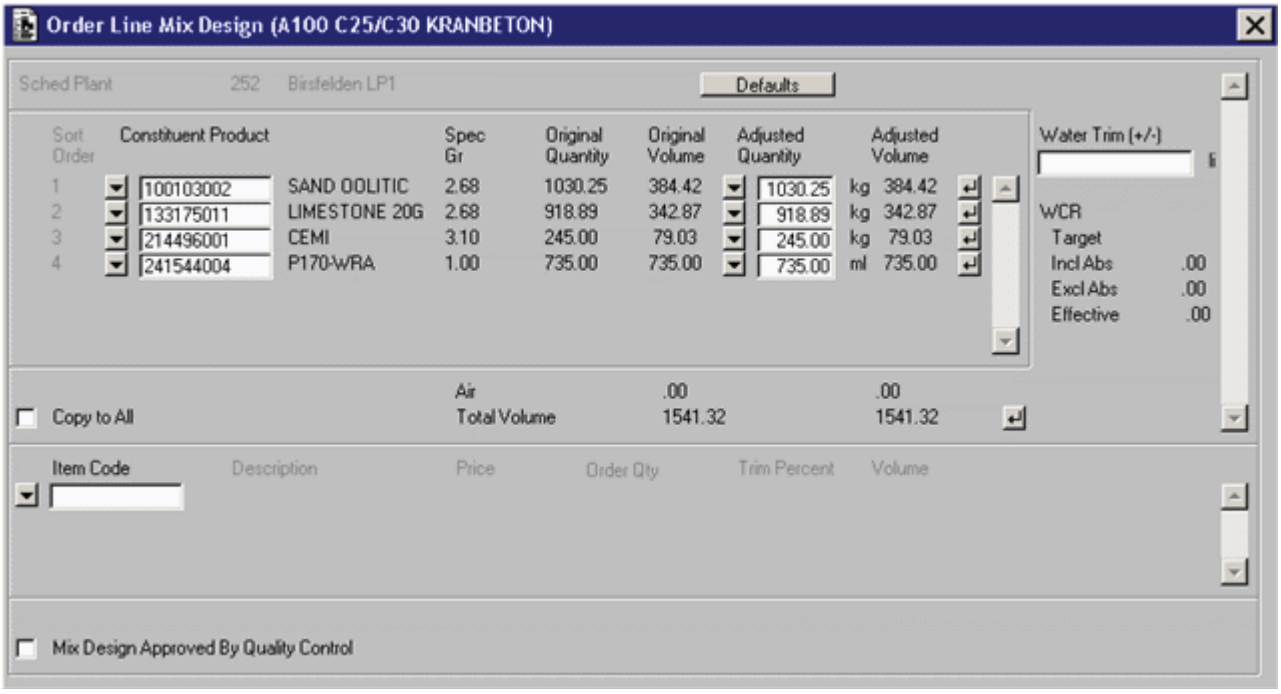
Order Level Mix Design-Order screen



3. After entering a mix and an **Order Quantity**, press the **Mix Design** button.
4. The **Order Line Mix Design** screen displays. The screen title bar will also show the selected mix.
   - If you are licensed for the Technical Quotation System (TQS) and use it to create a mix, opening the Order Line Mix Design screen will only let you view the mix details; you cannot edit them.

Order Line Mix Design screen (EDTORDRP)

Order-Line Mix Design screen (EDTORDRP)



5. Enter the **Scheduled Plant**.
6. If you want to begin with the standard mix design, press the **Defaults** button. The mix design for the mix at the selected plant will display.
7. The **Sort Order** number automatically displays in this field. If changes are necessary, detail on the field to adjust.
8. For each item in the mix, enter a **Sort Order**, the Item Code for the **Constituent Product**, and the **Quantity**. Use the **Add Occurrence** button to add additional constituents.

   All constituents included in this section of the screen will be included in the base mix price. To add an item for which the customer will be charged extra, use the **Item Code** field below.
9. If the order is to be shipped out of multiple plants, you have two options:
   - Select the **Copy to All** checkbox to make the design available at all plants.
   - Select the **Add Occurrence** button to the right of the **Copy to All** button. A new design form will appear, allowing you to enter a separate mix design. You can scroll between these mix designs using the scroll bar on the right of the screen. This feature may be useful if plants have different constituents on hand.
10. If you want to add an associated product, one for which the customer will be charged extra, enter the product's **Item Code**, **Order Quantity**, and **Trim Percent.**
11. The **Mix Design Approved by Quality Control** checkbox determines if the mix can actually be shipped. Use field-level security to restrict access to this field to QC engineers.
12. **Accept** the screen to save the mix design and return to the Order Entry screen. The **Mix Design** button will be highlighted to indicate that a mix design is present.
13. Schedule and save the order as usual.

The modified mix is stored at the user level, and has no effect on the mix design in the Item Master File. Once the order has been created, the sequence of events is dependent on how your system is configured.

Mix Design Interface - QA

The **Mix Design Interface** screen lets the user send mix product constituent information to a batching system. After the selection parameters are entered, the user is allowed to edit the list of products to be downloaded. After the user is satisfied with the products to be downloaded, **accept** the screen and the mix product information is downloaded to the batching system.

To use the Mix Design Interface:

1. Go to the **Mix Design Interface** screen {Manage > Application Management > Mix Design Interface}.

2. Select a **Mix Download Method** from the drop-down list. Options are:
   - Download from Item Master
   - Download from Order
   - Upload to Orders
3. Select an **Output to** option from the drop-down list. The options are:
   - Batch Panel Output
   - File Output

   This field will not be available if the selected **Mix Download Method** is **Upload to Orders**.
4. If **File Output** is selected, enter an **Output File** and select a **Document Format Group**.
5. Enter a range of values for **Item Code**, **Plant Code**, and **Item Category**.
6. In the **Mixes with Constituent** field, enter a constituent item code to be used when retrieving mix items. If entered, only mix items that contain the specified constituent item will be retrieved and sent to the batching system.
7. If you wish to delete all mixes from the batch panel at one or more plants, mark the **Clear Mix Files** checkbox for the specific plants.

   WARNING: This function is very dangerous. Selecting this checkbox instructs the system to delete all mixes from the batching system, and they are NOT retrievable.
8. Click **Retrieve**. This will save the products for downloading.
9. **Accept** the **Mix Downloads** screen to send the mix product constituent information to the batching system or to an output file.

Ticketing

Once the order-level mix design is approved, ticketing is just like standard concrete ticketing. The only time the process differs is when the dispatcher attempts to ticket a load with an unapproved mix design. What happens when a user attempts to ticket an unapproved mix depends on the setting of **Allow Override of Unapproved Mix Designs** in Tickets.

If the Allow Override flag is not checked:

The user will receive a message that the ticket has an unapproved mix design, and cannot be ticketed. The ticketing screen will clear.

If the Allow Override flag is checked

The user will receive a message that the mix design is not approved, and will be given a Yes/No option to override. If the user selects yes, the load will be ticketed. The mix design will still be recorded as unapproved.

If the user selects no, the ticket process will be cancelled.

Automatic Caller ID

The Automatic Caller Identification feature is designed to streamline the process dispatchers use when entering orders from phone calls in COMMANDseries.

Previously, when a dispatcher received phone calls, callers had to identify themselves, and then the dispatcher had to manually search for the caller in COMMANDseries. Now, when dispatchers receive a call from a contact with information already entered in the system, the caller's name and orders can be displayed on the screen by the time the dispatcher picks up the phone, without any manual lookup.

This new feature operates via an interface with VoiceGate's call-processing technology. COMMANDseries will receive Caller ID information from VoiceGate and attempt to match the incoming telephone number to a number in the new database table, Contact Phone Number (CTTN). If the incoming telephone number matches a number in the table, a list of matching contacts will be displayed on the updated Order Prefix (CPOL) screen.

Although the updated Order Prefix screen will be available to all users (including those without VoiceGate), the Automatic Caller ID license code (ID) must be added to the License manager {Files > System Information > Licenses) to support the interaction between VoiceGate and COMMANDseries.

Topics in this section:

Configuration

Workflow

Manual Lookup

Contact-Deliver To-Customer Order Lookup Form

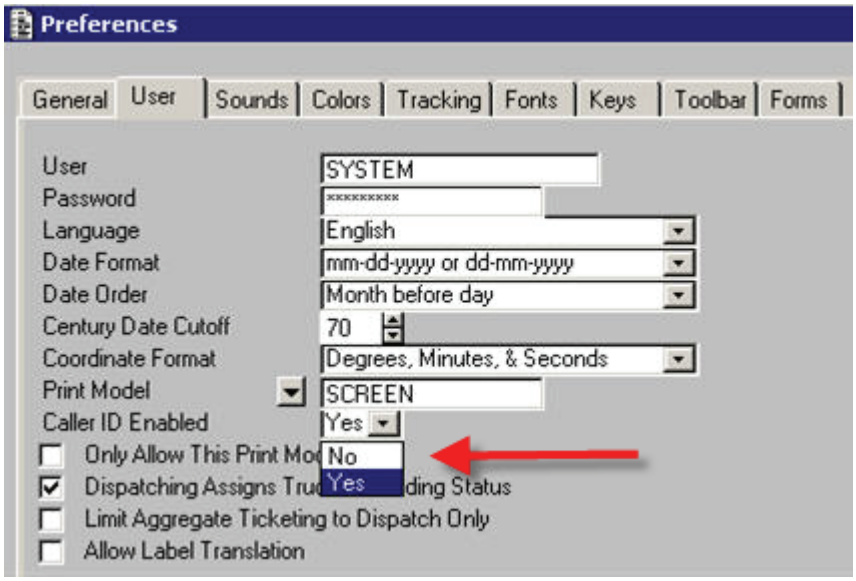
Configuration

For those users who have VoiceGate already licensed and installed on their systems, setting up Automatic Caller ID is a simple process.

To enable Caller Lookup:

Select the **Caller ID Enabled** drop-down box on the **User** tab in Preferences. When selected, you can manually look up contacts by phone number on the Order Prefix screen.

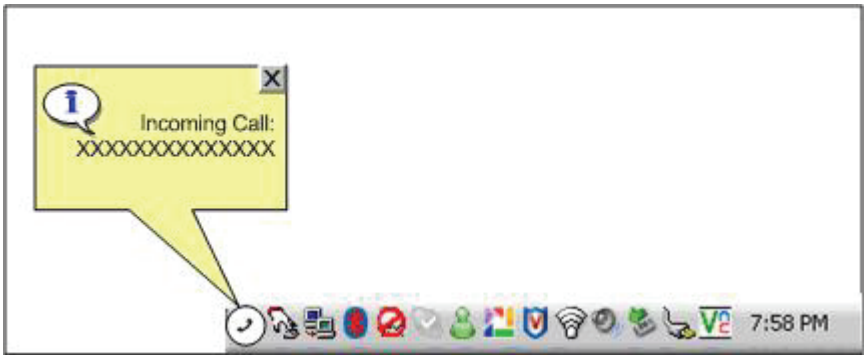
- Select **Yes** to enable the caller lookup feature.
- Select **No** to disable the caller lookup feature.



CommandAlkon does not support VoiceGate in any way. For troubleshooting VoiceGate, refer to your VoiceGate user manual.

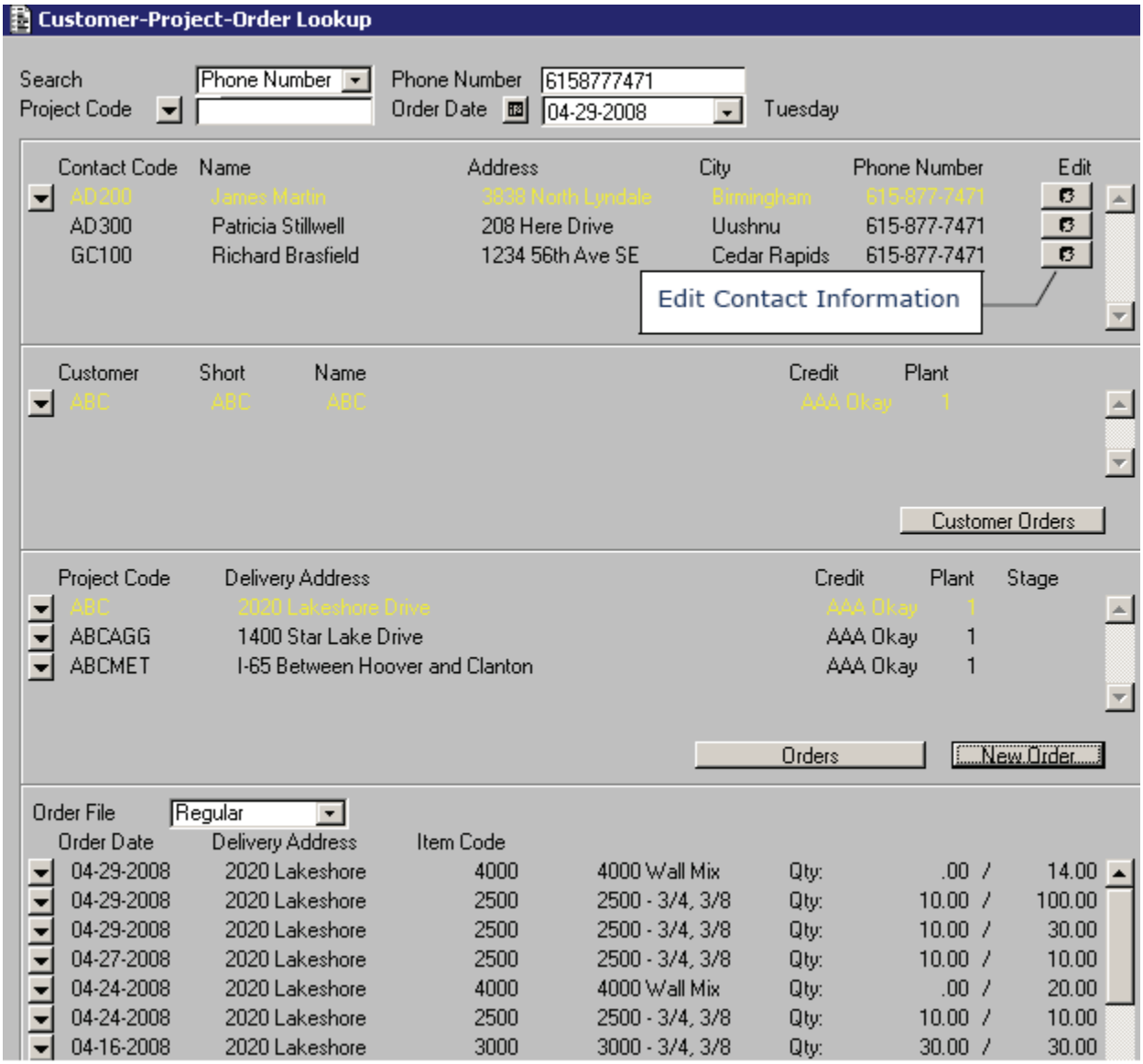
Workflow

Once the Automatic Caller Identification license feature has been added to the License editor, a prompt similar to the following will display on your desktop whenever an incoming call is received:



You have three choices when presented with this prompt:

1. Click the gray **X** to close the prompt and take no further action.
2. Do nothing; the prompt will fade within 30 seconds.
3. Click directly on the prompt to display the Order Prefix screen.



The following information displays for each contact on the expanded Order Prefix screen:

- Contact Code
- Contact Name
- Contact Address
- Contact City
- Telephone Number

If the contact is linked to a specific Customer Code, the Order Prefix screen will also display the last ten orders in the customer's order history. In addition, the detail button to the left of the Contact Name will open a new Order with the linked Customer Code already entered. If the contact is not linked to a Customer Code, the button will not display.

If a caller does not already have information in COMMANDseries, the Contact Editor displays so you can enter information about the caller while on the phone. The new Contact screen will be prepopulated with the incoming caller's phone number.

To edit a contact, click the **Edit Contact Information** button on the far right of the contact line to open the Contact Editor for that contact.

Manual Lookup

There are now two ways to manually look up a contact: by phone number and by name. A new search field has been added to the Order Prefix screen to allow for this functionality. See the Configuration section for more information on how to set up this feature.

To search manually by phone number:

1. Select **Phone Number** from the Search drop-down list.
2. <Tab> to the **Phone Number** field, and then enter the phone number.
3. <Tab> again to display information for the contact associated with the phone number entered.

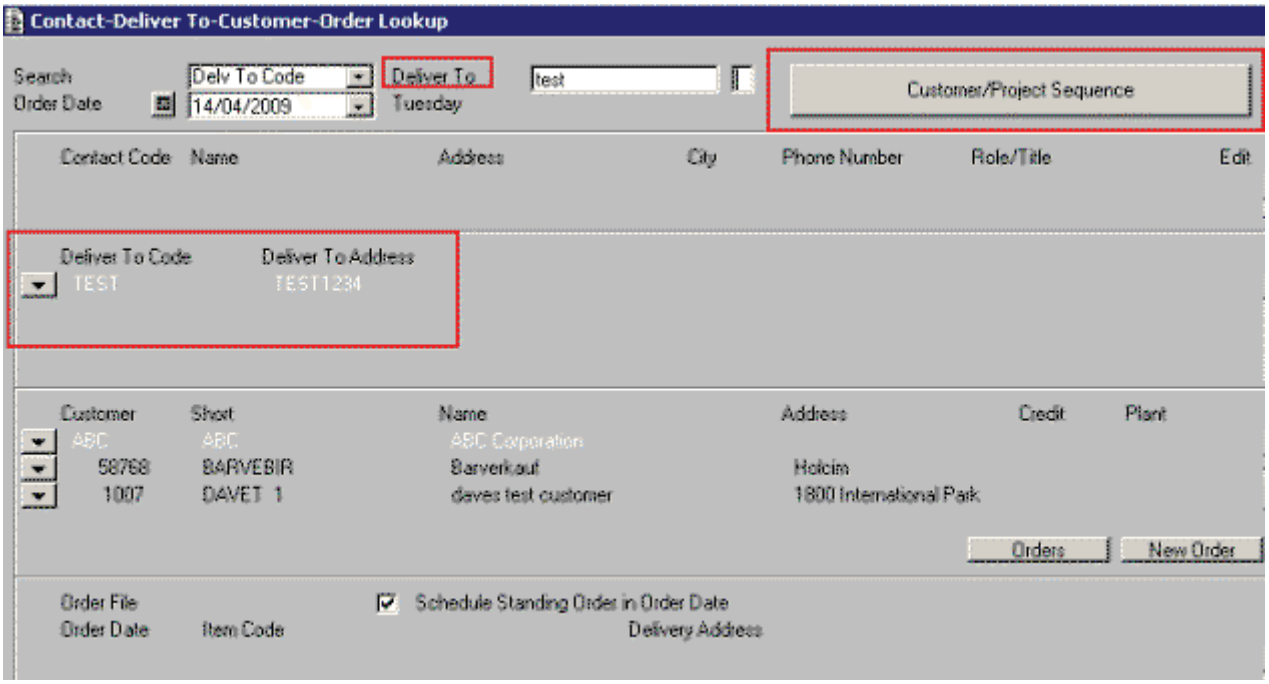
Once you have successfully searched for a contact (using either the **Name** or **Phone Number** option), select the **detail button** next to a contact in the new Contacts section to display all customers, projects, and orders associated with the selected contact.

Contact-Deliver To-Customer Order Lookup Form

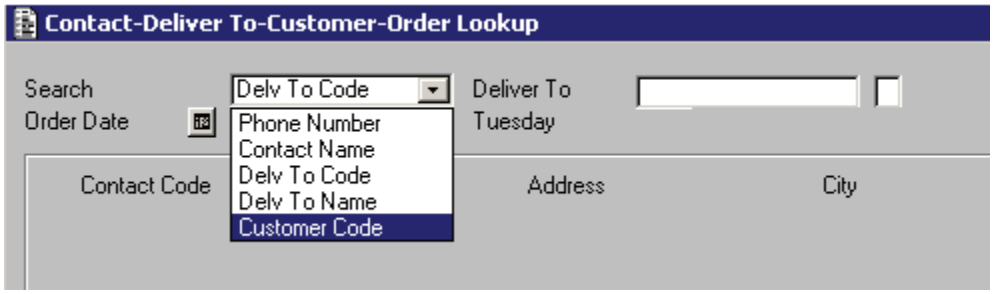
A new form, similar to the existing Customer/Contact/Project (CCPOL) form, has been created for the Caller ID module. This form, called the Contact-Deliver To- Customer-Order Lookup form (or CDCOL for short), will display Deliver To information in addition to Order, Customer, and Contact information, for incoming callers.

Note: Only users with Contract Integration in their license will be able to use this form.

CDCOL (Contact-Deliver To-Customer-Order Lookup) Screen - EDTORDRY



- **Search** - Select either Phone Number, Contact Name, Deliver To Code, Deliver To Name, or Customer Code to view those associated records. The field next to the Search drop-down will change according to what you've selected. Enter your search criteria in this field to bring up related records that start with or match your search criteria.



- **Customer/Project Sequence** - Select this button to switch to the CCPOL form. When you are on the CCPOL form, the button will be renamed **Deliver-To/ Customer Sequence**, and will take you back to the CDCOL form when pressed.

The process flow for the Caller ID module remains mostly the same as before, the exception being that the new CDCOL form will display if there are any Deliver To addresses for the customer. As each Deliver To is selected, the form will then display the associated customer information for that Deliver To.

If the caller's (contact) telephone number is not found for any Deliver To addresses, you will be prompted to create a new contact. You can then select whether or not the contact is going to be a Customer contact or a Deliver To contact. If you select Customer contact, the Customer/Contact/Project (CCPOL) form will be displayed; otherwise the Deliver-To form (CDCOL) form will be displayed.

- Contacts will be linked to a DCON (Deliver To Contact) record. If any DCON records already exist for a Contact, the CDCOL form will display.

If you access the screen manually {Dispatch > Orders > Options > Prefix Screen}, the system will check to see if the contact you entered has any associated Deliver To entries. If so, the CDCOL screen will display; if not, the CCPOL screen displays instead.

Truck Ahead-Truck Behind

Producers are requesting COMMANDseries provide automated delivery-related communications capability to reduce the amount of delivery-related voice communications between drivers and Dispatch. In a typical dispatch office, there is a steady stream of phones ringing and chatter. One of most common types of chatter is the communication between the drivers and dispatch. While this communication is a necessity, minimizing this chatter results in more efficient dispatch operations.

To reduce communications traffic, COMMANDseries provides the ability to establish automated messaging via signaling units. When a load is ticketed, this system will send messages to the ticketed truck as well as the truck(s) ahead of and/or behind the ticketed truck in the order's schedule. The messages will notify each truck of the trucks immediately ahead of/behind them. The overall result will be that each truck will have more accurate dispatching information, reducing the number of calls to the dispatcher.

Example

TRUCK 1 - First ticket

TRUCK 2 - Second ticket

TRUCK 3 - Third ticket

TRUCK 4 - Fourth ticket, etc.

- When the first ticket prints:
  - Truck 1 receives a message similar to:

    `Truck Ahead: [blank] Truck Behind: [blank]`
- When the second ticket prints:
  - Truck 1 (if active and not 'At Plant') receives a message similar to:

    `Truck Ahead: [blank] Truck Behind: TRUCK2`
  - Truck 2 receives a message similar to:

    `Truck Ahead: TRUCK1  Truck Behind: [blank]`
- When the third ticket prints:
  - Truck 1 does not receive any message.
  - Truck 2 (if active and not 'At Plant') receives a message similar to:

    `Truck Ahead: TRUCK1 Truck Behind: TRUCK3`
  - Truck 3 receives a message similar to:

    `Truck Ahead: TRUCK2   Truck Behind: [blank]`
- When the fourth ticket prints:
  - Truck 1 does not receive any message.
  - Truck 2 does not receive any message.
  - Truck 3 (if active and not 'At Plant') receives a message similar to:

```
Truck Ahead: TRUCK2  Truck Behind: TRUCK4
```

- Truck 4 receives a message similar to:

```
Truck Ahead: TRUCK3  Truck Behind: [blank]
```

Cancelled Tickets

When a ticket is canceled during ticketing, the remaining ahead/behind vehicle(s) (if any) no longer have the correct 'ahead' and 'behind' information. Corrected information will be sent to the remaining active ahead/behind vehicles (if any) in the delivery cycle for that order.

Configuration

There are two elements to configuring this feature:

- Document Tags/Formats
- Signaling Units

Document Tags/Formats

Two documents must be created for document type **Mobile Signal Message**:

Tag Code	Tag Description	Tag Type
TRKSAH	Truck Ahead	Calculate
TRKSBH	Truck Behind	Calculate

Once the tags have been created, a new document format, TRKAHD, should be created using the following parameters:

- Line 1, Literal, Begin at: 1, End at: 12, Literal Text: "Truck Ahead:"
- Line 1, Field, Name: Trucks Ahead (TRKSAH), Begin at: 14, End at: 26
- Line 1, Literal, Begin at: 30, End at: 42, Literal Text: "Truck Behind:"
- Line 1, Field, Name: Trucks Behind (TRKSBH), Begin at: 44, End at: 56

The document layout should look like this:

"Truck Ahead: <TRKSAH> Truck Behind: <TRKSBH>"

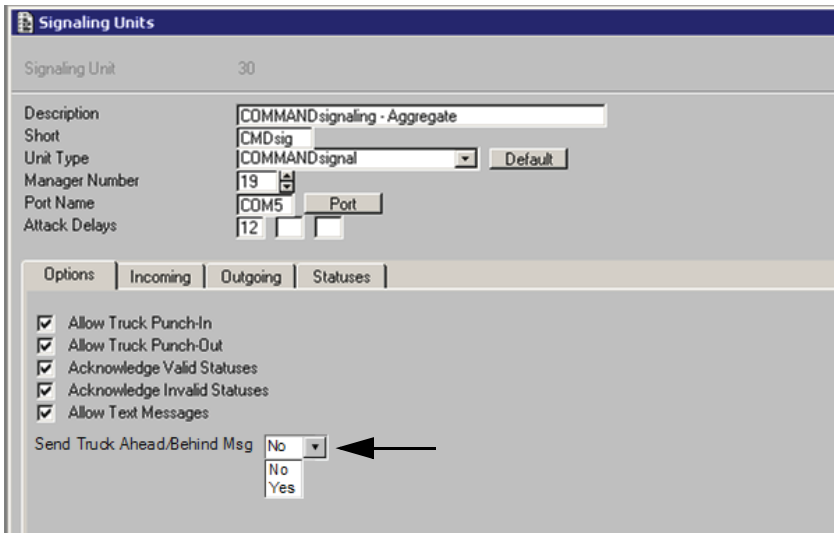
Signaling Units

Each signaling unit must be configured for the feature. Configuration is done on two different tabs within the Signaling Unit Editor.

Signaling-Options Tab

Enable the feature using the **Send Truck Ahead/Behind Msg** drop-down field.

Turn on the feature here.



Signaling-Outgoing Tab

In addition, the signaling unit must be configured to send the update message on the Outgoing tab.

To configure the outgoing message:

1. Enter a new Message **Code**.
2. Enter the **Outbound Message Text**.

   This message will not be displayed; the message will be based on the document format, as described earlier.
3. Select **Send Ahead/Behind Msg** as the Event.

   When this event is selected, the **Return Plant**, **Color**, and **Flag** fields will disappear for that occurrence.
4. Enter **TRKAHD** as the format name.
5. Press **Add Occurrence** and repeat the process to create the second entry.
6. **Accept** the screen.

Appendix F: SAP On-line Ticket Interface

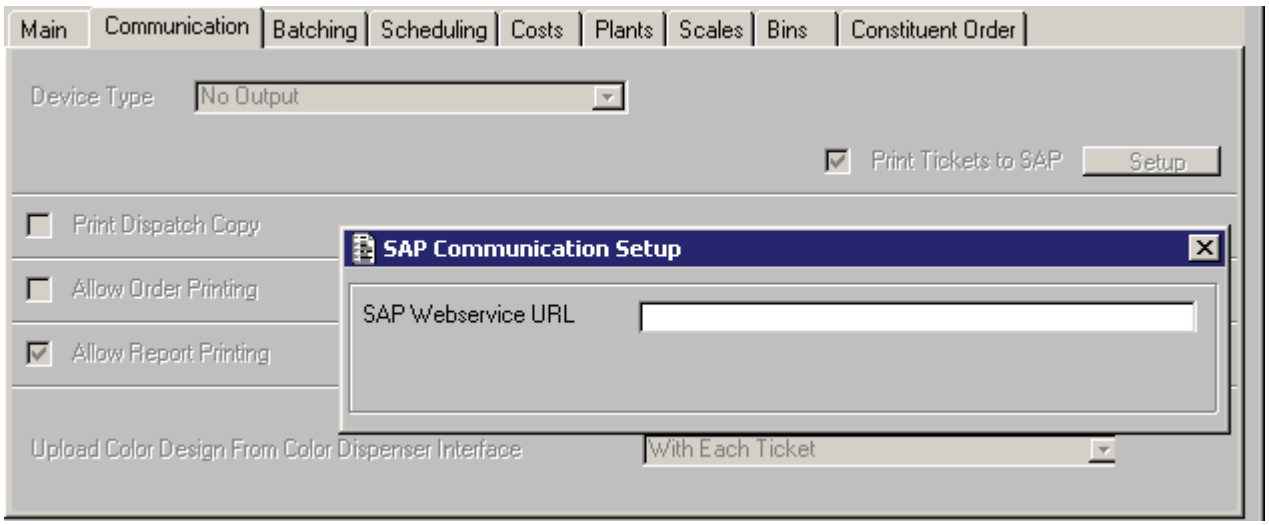
COMMANDseries can export ticket information via XML to SAP and subsequently receive a Control Number from SAP. The Control Number is stored against the Ticket Record. The XML transmission is triggered by Ticketing events (Ticket Creation and Ticket Removal).

Note: The customer is responsible for providing an appropriate interface program.

Plant Configuration

On the Plant > Communications tab, a new checkbox, **Print Tickets to SAP,** has been added. When this field is selected, a **Setup** button displays. Press this button to open the SAP Communication Setup screen.

SAP Communication Setup screen (EDTPLNTO)



To enable the interface, enter the appropriate SAP Webservice URL.

Operations

Ticket Creation

1. A ticket is created in COMMANDseries
2. Ticket information is sent via XML to SAP Webservice
3. Ticket send will be acknowledged.
4. Ticket will receive an SAP-generated control number. This field will be stored against the Ticket record in COMMANDseries

Ticket Removal

1. A Ticket is removed in COMMANDseries.
2. Ticket information is sent via XML to SAP Webservice.
3. Ticket removal will be acknowledged by SAP.
4. Ticket will keep the SAP-generated control number.

Ticket Reactivation

1. A Ticket is reactivated in COMMANDseries.
2. Ticket information is sent via XML to SAP Webservice.
3. Ticket reactivation will be acknowledged by SAP.
4. Ticket will keep the previously received SAP-generated control number.

The control number is stored in the **control_num.TICK** field. A new Ticket Print/Data Out document tag has been created to the field:

- SAPCTL (Description: SAP Control Number)
- Type: Ticket print and Data in/out
- Field: **control_num.TICK**

XML Formats

COMMANDseries

This is the post that CMDseries will send at the time of ticketing to your ERP server. The function this post is sent to will need to parse and send all pertinent information to your ERP server in order for the ticket to be printed. All available fields are listed below and will be sent regardless of whether there is a value contained within the tag or not.

```
<?xml version="1.0" encoding="utf-8"?>
<soap:Envelope xmlns:soap="http://schemas.xmlsoap.org/soap/
envelope/" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
<soap:Body>
<DTDSAPTKT>
 <TICK.CMDSERIES>
  <TKTL.CMDSERIES>
   <TLAP.CMDSERIES>
    <DELV_QTY.TLAP.CMDSERIES />
    <CSTMRY_DELV_QTY.TLAP.CMDSERIES />
    <METRIC_DELV_QTY.TLAP.CMDSERIES />
    <DELV_QTY_UOM.TLAP.CMDSERIES />
    <CSTMRY_DELV_QTY_UOM.TLAP.CMDSERIES />
    <METRIC_DELV_QTY_UOM.TLAP.CMDSERIES />
    <PROD_CODE.TLAP.CMDSERIES />
    <INTRNL_LINE_NUM.TLAP.CMDSERIES />
   </TLAP.CMDSERIES>
   <DELV_QTY.TKTL.CMDSERIES />
   <CSTMRY_DELV_QTY.TKTL.CMDSERIES />
```

```
      <METRIC_DELV_QTY.TKTL.CMDSERIES />
      <DELV_QTY_UOM.TKTL.CMDSERIES />
      <CSTMRY_DELV_QTY_UOM.TKTL.CMDSERIES />
      <METRIC_DELV_QTY_UOM.TKTL.CMDSERIES />
      <PROD_CODE.TKTL.CMDSERIES />
      <INTRNL_LINE_NUM.TKTL.CMDSERIES />
    </TKTL.CMDSERIES>
    <ORDER_DATE.TICK.CMDSERIES />
    <ORDER_CODE.TICK.CMDSERIES />
    <TKT_CODE.TICK.CMDSERIES />
    <TKT_DATE.TICK.CMDSERIES />
    <DRIV_EMPL_CODE.TICK.CMDSERIES />
    <HLER_CODE.TICK.CMDSERIES />
    <LOT_BLOCK.TICK.CMDSERIES />
    <PO.TICK.CMDSERIES />
    <SHIP_PLANT_CODE.TICK.CMDSERIES />
    <SHIP_PLANT_LOC_CODE.TICK.CMDSERIES />
    <SCALE_CODE.TICK.CMDSERIES />
    <TRUCK_CODE.TICK.CMDSERIES />
    <TRUCK_TYPE.TICK.CMDSERIES />
    <TYPED_TIME.TICK.CMDSERIES />
    <LOAD_TIME.TICK.CMDSERIES />
    <LOADED_TIME.TICK.CMDSERIES />
    <TO_JOB_TIME.TICK.CMDSERIES />
    <ON_JOB_TIME.TICK.CMDSERIES />
    <BEGIN_UNLD_TIME.TICK.CMDSERIES />
    <BEGIN_UNLD_TIME_PRINT.TICK.CMDSERIES />
    <END_UNLD_TIME.TICK.CMDSERIES />
    <WASH_TIME.TICK.CMDSERIES />
    <TO_PLANT_TIME.TICK.CMDSERIES />
    <AT_PLANT_TIME.TICK.CMDSERIES />
    <DELV_ADDR.TICK.CMDSERIES />
    <INSTR.TICK.CMDSERIES />
    <USER_DEFINED.TICK.CMDSERIES />
    <CUST_CODE.TICK.CMDSERIES />
    <PROJ_CODE.TICK.CMDSERIES />
    <SAP_TKT_ACTION.TICK.CMDSERIES />
    <CUST_JOB_NUM.TICK.CMDSERIES />
   </TICK.CMDSERIES>
  </DTDSAPTKT>
  </soap:Body>
  </soap:Envelope>
```

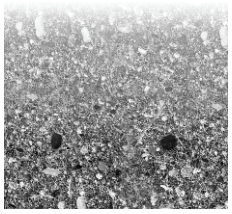
The **SAP_TKT_ACTION.TICK.CMDSERIES** field will tell whether the ticket is new, deleted, or reactivated. The corresponding values sent in this field are **CREATE**, **REMOVE**, and **REACTIVATE**.

ERP Server Output

Your function name and URL will be different than illustrated below. The error code is a numeric value that corresponds to the particular error that happened. Anything other than **0**

is considered an unsuccessful transaction in your ERP server. The control number is a field used by some South American customers for governmental regulation purposes. Other fields will be included in future releases depending on the need for them.

```
<?xml version="1.0" encoding="UTF-8" ?>
<ns1:ERPTicketResponse xmlns:ns1="http://commandalkon.com/">
        <error_code>0</error_code>
        <control_number>123456789</control_number>
</ns1:ERPTicketResponse>
```



Appendix G: Batch Confirmation and EU Link Enhancements

COMMANDseries has been updated so that the following occurs when the Generic EU Link is used for salable products, salable products with constituents, and alternative mix batch codes:

- New Tolerance and Sequence Codes will be set up in COMMANDqc and interfaced to COMMANDseries as part of the mix interface.
- Tolerance and Sequence Codes will be sent in addition to Water on Board quantities to the batch control system.
- The batch control system will look up the Tolerance values and Batching Sequence to determine the batching operations.
- Hydraulic Pressure from the truck mixer will be measured electronically or manually, and then entered into the batch control system.
- The batch control system will control the number of cycles and determine if an additional manual Adjusting Cycle is required and what weights can be batched in that cycle.
- The batch control system will determine if the load is in tolerance.
- The batch control system will send the tolerance information, hydraulic details, etc., to COMMANDseries, where they will be stored at the appropriate level.
- COMMANDseries will interface Ticket Weight information with COMMANDqc, but will not interface cycle-level information. Reporting on cycle-level information will be done directly from COMMANDseries.
- COMMANDseries will automatically print the ticket if the load is marked as being in total tolerance or acceptably out of tolerance. Any component that is outside the acceptable tolerance range be noted with a flag on the ticket print.
- Tickets that are outside the overall tolerance level, but are still acceptable, will be automatically suspended and reviewed by the quality department who will instruct the batcher as to the allowed course of action: i.e., dump the material, use it on a different order, etc.
- The batcher will add a Reason Code to all non-complying loads prior to printing the physical ticket.
- The quality department will follow the factory production control process to record the corrective action and make a suitable note against the ticket record in COMMANDseries.

Logic

The following is the system logic used when weights are returned from the batch control system:

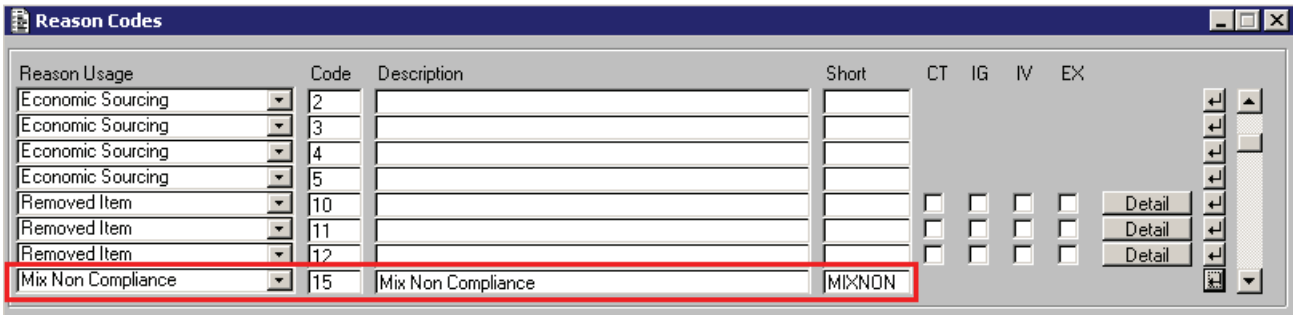
- If the ticket IS in tolerance and the plant's **Batch Confirm Option** (on the Plants > TQS tab) is set to **`Auto Print, Yes`**, the ticket will be automatically printed using the **Print Delayed Ticket Weights** {Plants > Communication} option.
- If the ticket IS NOT in tolerance and is unacceptable (and the **Batch Confirm Option**) is set to **`Auto Print, Yes`**, the ticket will be automatically printed using the **Print Delayed Ticket Weights** option. The Batch Confirmation form with the Ticket Weight's comply status set to **No** will be automatically displayed as well.
- A new **Reason Code** field on the Batch Weight Confirmation screen must be completed with the new **`Mix Non Compliance`** reason code before the user can save the screen when the system-level batch confirmation action is set to **Warn the User**.
- When the Batch Weights Confirmation screen has been successfully saved, the system will automatically print the ticket using the **Print Delayed Ticket Weights** {Plants > Communication} option.
- When the tolerance-checking logic is not performed n the batch control system, the status and reason code functionality above will be available for manual entry.
- The COMMANDseries ticket print functionality will accommodate the following:
  - A suitable water/cement ratio considering the **K** factor of the components and the admix water threshold in the configuration.
  - A Ticket Print attribute that considers if the actual weight of a component is batched outside the acceptable tolerance values.

Setup

Add New Reason Code

First, go to the Reason Codes editor {Files > General Information > Reason Codes} and create a new **`Mix Non Compliance Reason Code`** from the **Reason Usage** drop-down box. Save the screen.

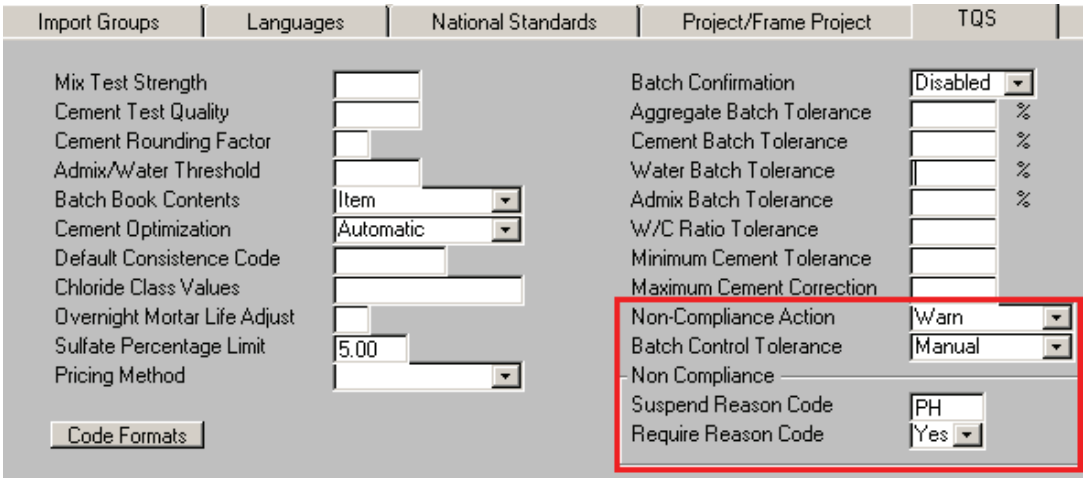
Reason Codes Screen (EDTRSNC)



Set Configuration

Next, go to the Configuration > TQS tab. New fields have been added to specify how the Generic EU link will send information.

Configuration > TQS tab (EDTCNFXZ)

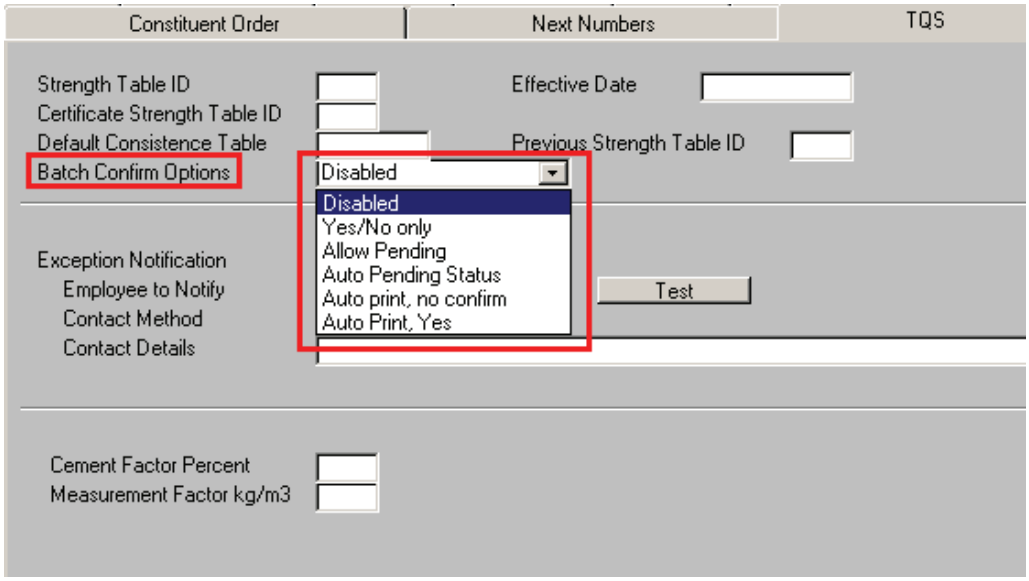


- **Non-Compliance Action** - Select **`Warn`** (to receive a message indicating that the ticket is not intolerance and is unacceptable; you can accept the message and proceed, or cancel and start over) or **`Stop`** (to receive a message indicating that the ticket is not intolerance and is unacceptable; you can only cancel and start over. You will not be allowed to continue).
- **Batch Control Tolerance** - Specifies how the batch confirmation will be set: **`Manual`** or **`Batch Control`**. Stored in the database as **`BATCH_CONFIRMATION_SOURCE.CNFB`**
- **Suspend Reason Code** - Enter a reason code in this field that has a **Reason Code** Usage of **`Suspend Item`**. Stored in the database as **`NON_COMPL_SUSP_RSN_CODE.CNFB`**
- **Require Reason Code** - Select **`Yes`** to indicate if a **`Mix Non Compliance`** **Reason Code** is required for loads that are out of tolerance on the Ticket Weights Confirmation screen. Stored in the database as **`REQUIRE_NON_COMPL_RSN_CODE.CNFB`**.

Plants Editor

Now go to the Plants > TQS tab. A new **Batch Confirm Options** field has been added to this tab. Select from one of the following options, which will determine whether or not the Ticket Weights Confirmation screen displays, as well as if the ticket is automatically printed.

Plants > TQS tab (EDTPLNTL)

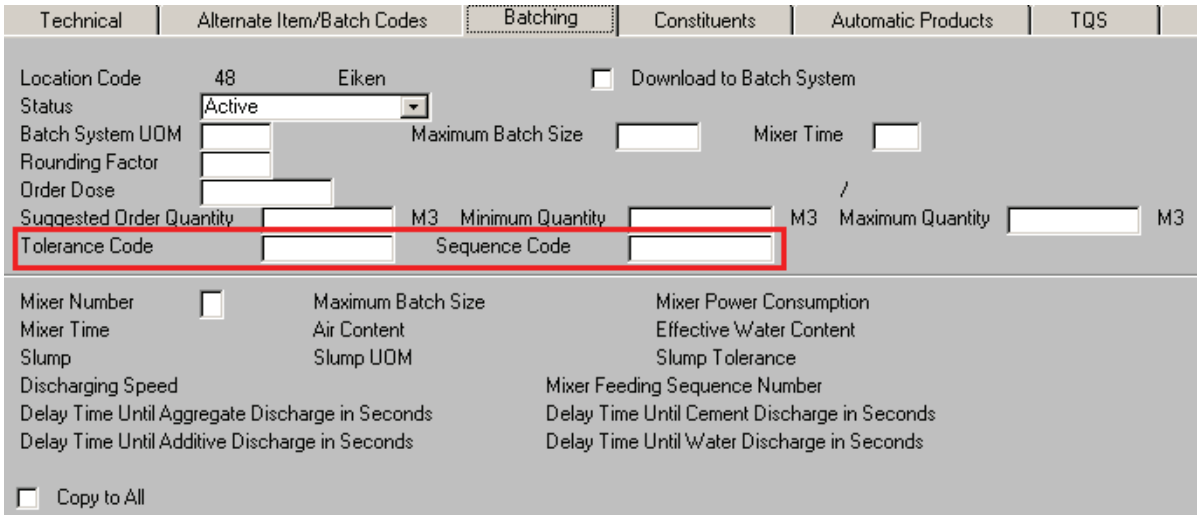


- **`Disabled`** - Ticket Weights Confirmation screen will not display.
- **`Yes/No Only`** - You will receive a message asking if you wish to have the Ticket Weights Confirmation screen display.
- **`Allow Pending`**
- **`Allow Pending Status`**
- **`Auto Print, No Confirm`** - The ticket will be printed automatically without your needing to confirm the auto print.
- **`Auto Print, Yes`** - The ticket will be printed automatically. Cannot be set if the Configuration's **Batch Control Tolerance** is set to **`Manual`**.

Items Editor

The Items > Batching tab has been updated to include new fields for the **Tolerance Code** (**`TOLERANCE_CODE.ILOC`**) and the **Sequence Code** (**`SEQUENCE_CODE.ILOC`**). The information you enter in these fields will be interfaced with COMMANDqc at the mix/plant level.

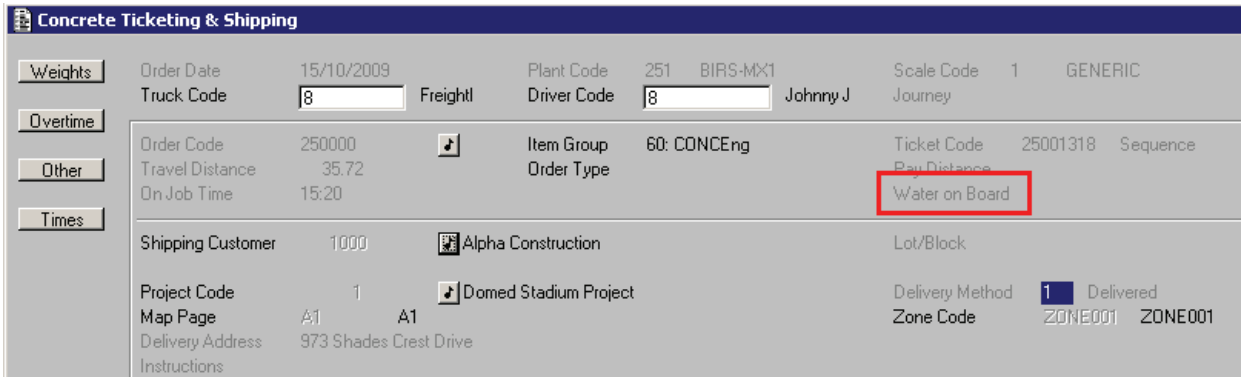
Items > Batching tab (EDTIMSTD)



Concrete Ticketing & Shipping Screen

The Concrete Ticketing & Shipping screen has been updated with the new **Water on Board** field (**WATER_ON_BOARD.TKTL**), which is used to store the amount of water that is on board the truck prior to batching.

Concrete Ticketing & Shipping Screen (EDTSHIP)



In addition, a **WATER_ON_BOARD_UOM** field has been added to the TKTL table to record the UOM. Double-click on the **Water on Board** field to display the Units of Measurement screen and select the desired UOM.

- When the system-level measurement system is set to Metric, the default value will be 50011 Litres.
- When the system-level measurement system is set to Imperial, the default value will be 50004 Gallons.

EU Generic Link Field Updates

The following fields have been added to the T007 Batching Related Fields section. Information stored in these fields comes from the information you entered on the above screens:

- The value of the new **SEQUENCE_CODE.ILOC** in field number 435
- The value of the new **TOLERANCE_CODE.ILOC** in field number 436
- The value of the new **WATER_ON_BOARD.TKTL** in field number 437
- The value of the new **WATER_ON_BOARD_UOM.TKTL** in field number 438

The following fields have been added to the T007 TQS Related Fields Section:

- The value of **MAX_WATER_CEM_RATIO.IMST** relating to the saleable product.
- The value of **MIN_CEM_CONT RATIO.IMST** relating to the saleable product.

The following field has been added to the Transfer of Purchase Order and Raw Material Receipts section:

- The value of **MATL_VEN_CODE.IDTL**, if field 010

Generic EU Link Enhancements

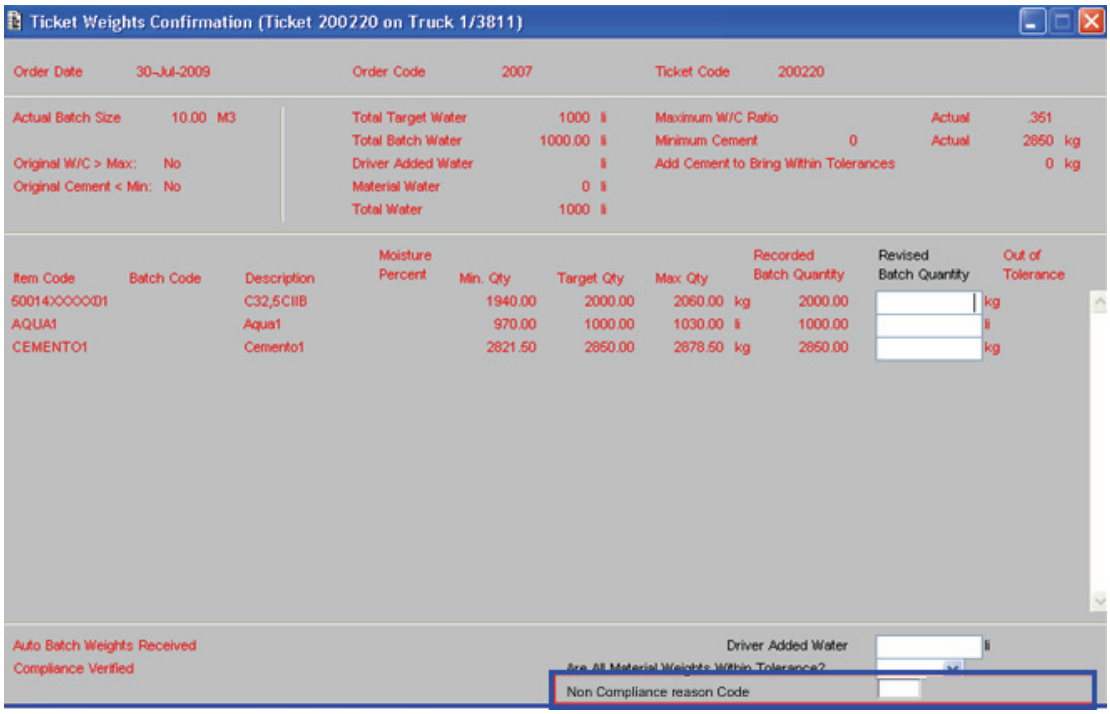
The Generic EU Link has been updated to send the below new fields from the batch control system to COMMANDseries. Information contained in these fields will then be to COMMANDqc using the standard interface tables. This information is viewable on the Ticket Weights Confirmation screen, which is discussed in the next section.

- **WEIGHT_COMPLY_STATUS.TICK –** Used to indicate if a Load that has been batched is in tolerance. These values will be sent in the new **015 Load Tolerance** field in the Ticket Results Section.
  - Serious Out of Tolerance - 00
  - In Tolerance - 01
  - Slightly Out of Tolerance - 02
  - Compensated Out of Tolerance - 03
- **WEIGHT_COMPLY_REASON_CODE.TICK –** The Reason Code indicating why the mix was out of tolerance. This information will be sent in the new **016 Load Tolerance Reason Code** field in the Ticket Results Section.
- **COMPENSATED_CONSTITUENT.TWGT –** Indicates if the component item was included in the adjusting batch to compensate for tolerance. Sent as a **T** value in fields **260** through **275** in the Ticket Results Section.
- **MANUAL_ADJUSTING_CYCLE.TWGB –** Indicates if the cycle (batch) is a manual adjusting cycle. Sent as a **T** value in field **023** of the T015 Batch Results section.
- **MIXER_LINE_NUMBER.TICK –** Indicates the Mixer or Line Number that was used to mix the load. Sent in field **017** of the T014 Ticket Results section.
- **TRUCK_HYDRAULIC_PRESSURE.TICK –** Indicates the actual truck hydraulic pressure measured by the batch control system while loading. Sent in field 018 of the T014 Ticket Results section.

Ticket Weights Confirmation

The Ticket Weights Confirmation screen has been updated with a field that records the Mix Non Compliance Reason Code.

Ticket Weights Confirmation Screen (EDTBWGT)


Ticket Weights Confirmation (Ticket 200220 on Truck 1/3811)
Order Date 30-Jul-2009
Order Code 2007
Ticket Code 200220
Actual Batch Size 10.00 M3
Original W/C > Max: No
Original Cement < Min: No
Total Target Water 1000 li
Total Batch Water 1000.00 li
Driver Added Water li
Material Water 0 li
Total Water 1000 li
Maximum W/C Ratio Actual .351
Minimum Cement 0 Actual 2850 kg
Add Cement to Bring Within Tolerances 0 kg
Item Code
Batch Code
Description
Moisture Percent
Min. Qty
Target Qty
Max Qty
Recorded Batch Quantity
Revised Batch Quantity
Out of Tolerance
50014XXXXXD1 C32,5CIIB 1940.00 2000.00 2060.00 kg 2000.00 kg
AQUA1 Aqua1 970.00 1000.00 1030.00 li 1000.00 li
CEMENTO1 Cemento1 2821.50 2850.00 2878.50 kg 2850.00 kg
Auto Batch Weights Received
Compliance Verified
Driver Added Water li
Non Compliance reason Code

When the form is loaded with Ticket Weight results, the **Non Compliance Reason Code** field will be populated if the value of the **Weight Comply Status** in the TICK table is not **`In Tolerance`**. The Reason Code field can also be blank upon opening the Ticket Weights Confirmation screen. It will be mandatory for entry if the **Require Reason Code** field on the Configuration > TQS tab has been set to **`Yes`**.

Ticket Print

The following information will be printed automatically:

- For individual Components:
  - Product Short Name
  - Batching Unit of Measure
  - Design Weight
  - Extended Design Weight (a)
  - Moisture % Measured by the Batch Control System (b)
  - Theoretical Absorbed moisture (c)
  - Theoretical Wet Weight (d)
  - a*((1+(b/100))/(1+c/100)))
  - Actual batched weights

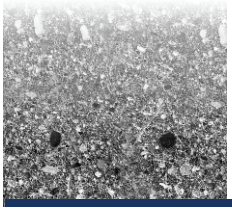
Actual Variance to Theoretical Wet Weights

% Variance to Theoretical Wet Weights

Theoretical Water Content (d-a)

Theoretical Free Water Content (b-c)

- For the total load
  - Total sum of Extended Design Weight
  - Total sum of Theoretical Wet Weight
  - Total sum of Actual Batched Weights
  - Total Theoretical Free Water Content
  - Per m3 Extended Design weight
  - Per m3 of Theoretical Wet Weight
  - Per m3 of Actual Batched Weights
  - Actual Water/Cement Ratio



Appendix H: Counter Sales (Cash and Carry)

This modification begins the process of migrating Cash and Carry functionality from V6.00 to CS08 V3, enabling Point of Sale (POS) purchases through standard COMMANDseries functionality. With this functionality, someone can order material, receive it, and pay for it at the same time.

This modification addresses five major forms:

- Credit Codes
- Customers
- Concrete Ticketing & Shipping
- Edit Orders & Ticketing
- Aggregate Ticketing

Cash & Carry Orders

A Cash and Carry order is an order in which the customer comes to you, orders merchandise, pays for it, and takes it away himself.

An order is defined as as Cash and Carry if the customer is assigned a Cash and Carry credit code.

Cash and Carry orders have the following constraints:

- They must be paid in full and ticketed when the order is saved.
- Only one ticket is allowed; the delivered quantity must equal the ordered quantity.
- Once payment has been entered, a Cash and Carry order cannot be changed or copied.
- Canceling a Cash and Carry order will automatically cancel the associated ticket and payment.

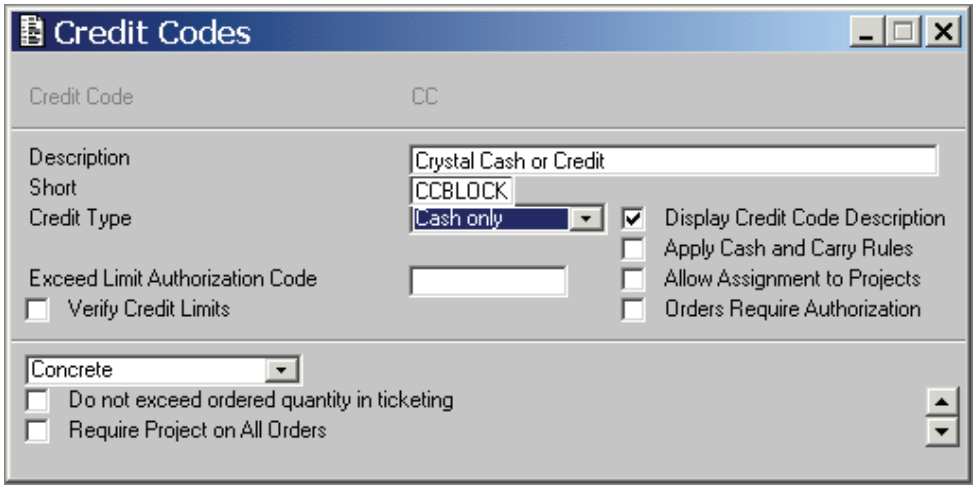
Cash and Not Carry

A Cash and Not Carry order is a standard cash order.

Cash & Carry Configuration

Credit Codes

The Credit Code editor has been updated so that if the **Credit Type** is set to **`Cash only`**, a new checkbox, **Apply Cash and Carry Rules**, will display.

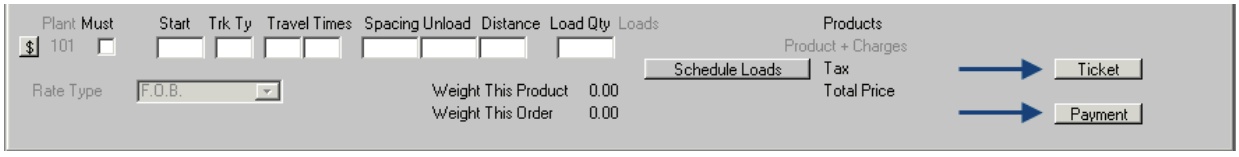


You will need to create at least one Cash and Carry credit code, and assign it to your cash and carry customers.

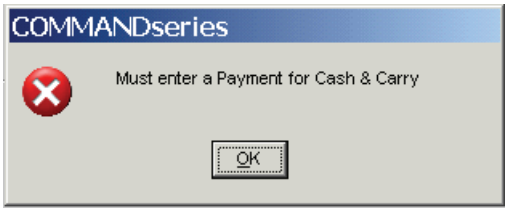
Cash & Carry – Order Entry

When a customer with a Cash and Carry credit code is entered in Order Entry (whether it is the standard Order Entry, Concrete Ticketing & Shipping, or Aggregate Ticketing), two things will happen:

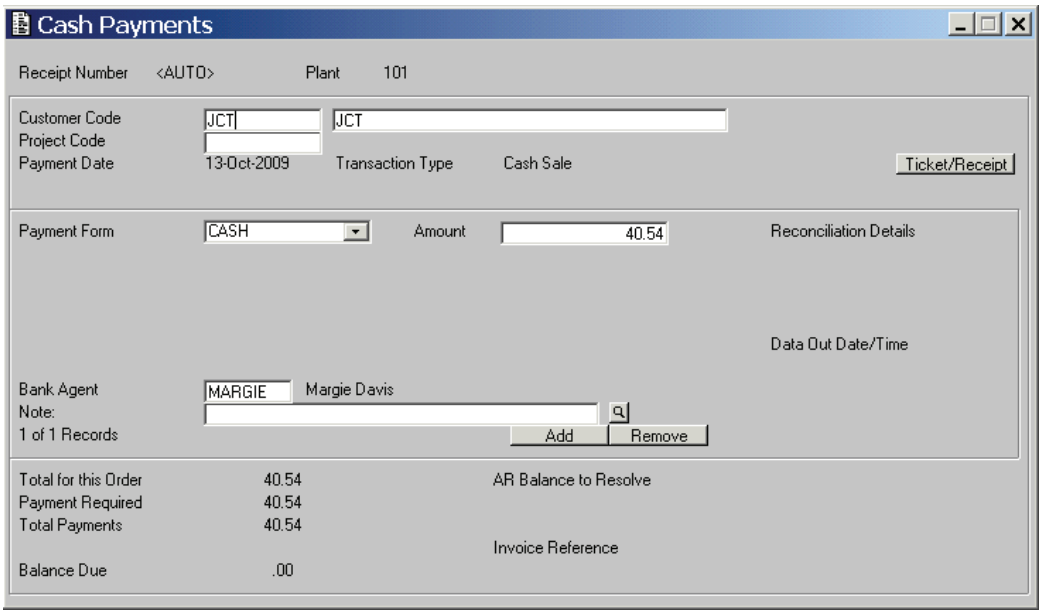
- Your Login Plant will default as the Schedule Plant. The Schedule Plant field is not editable for Cash & Carry Orders.
- A **Ticket** button and a **Payment** button will appear in the lower right corner; that indicates that the Cash and Carry logic has been invoked.



When the order is completed, press the **Payment** button. If you attempt to save the order before entering a payment, the system will inform you of the error:



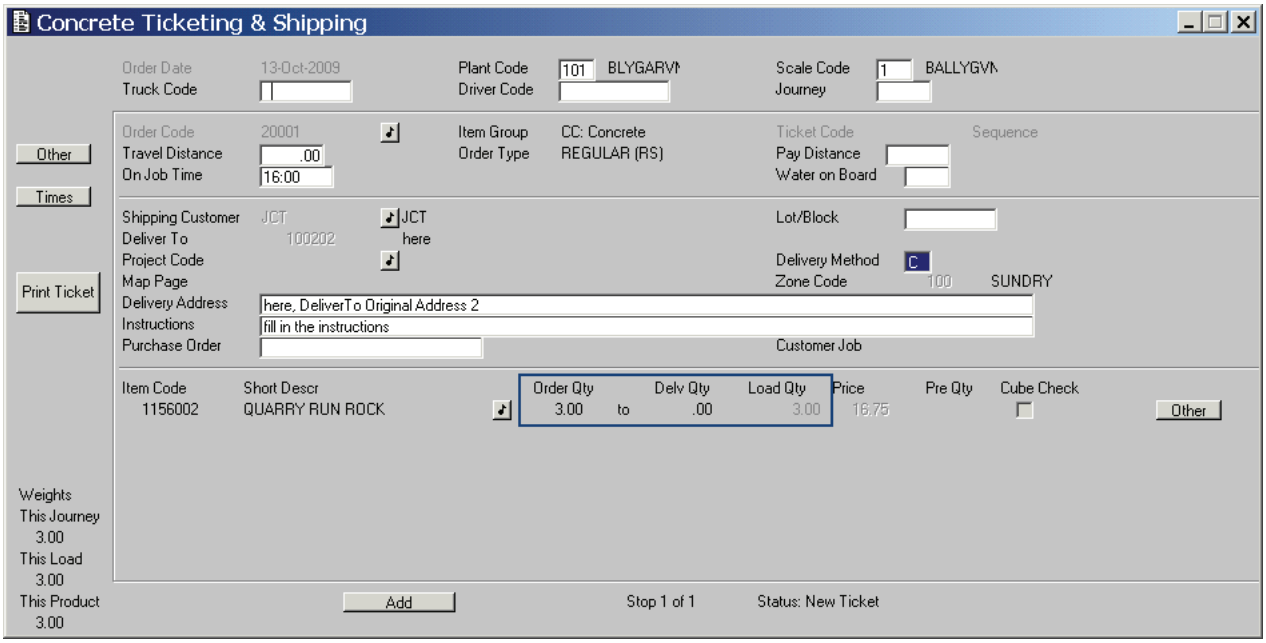
When the Payment button is pressed, or when the preceding error message is acknowledged, the Cash Payments screen will display.



The full payment amount will default into the **Amount** field. The screen cannot be accepted if the **Balance Due** is anything other than zero.

When the payment is accepted, you will be prompted to select a receipt printer. Once the receipt has been sent to the printer, you will be returned to the Orders screen. From there, press the **Tickets** button to open the ticketing screen.

Note: For Cash and Carry orders, the Payments screen must be accessed through the Orders screen. It cannot be accessed from the main menu.



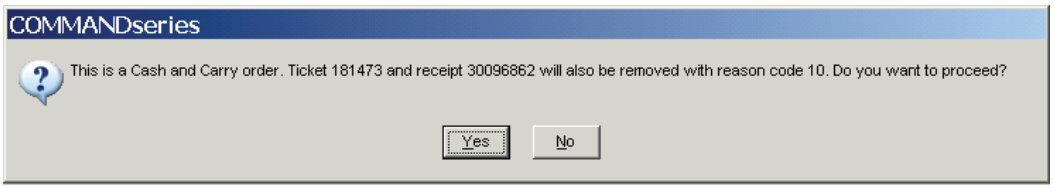
- The Load Quantity is automatically set at the Ordered Quantity, with no option to edit the amount. Enter an FOB truck and ticket normally.
- Trucks configured as **Delivered** cannot be used for Cash & Carry tickets.
- If you exit the ticketing screen without generating a ticket, the system will automatically cancel both the order and payment. You will be prompted for a reason code.

Cancelling an Order

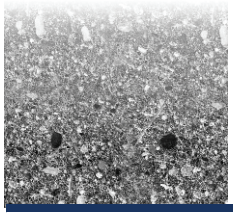
Cash & Carry orders can only be cancelled from one of two screens:

- Order Entry
- Edit Orders & Tickets

When you attempt to cancel a Cash & Carry order, you will be prompted for a reason code, as usual. After you have entered a reason code, the following screen will display:


COMMANDseries
This is a Cash and Carry order. Ticket 181473 and receipt 30096862 will also be removed with reason code 10. Do you want to proceed?
Yes
No

If you reply yes, then the order, payment, and ticket will all be removed with the entered reason code.



Appendix I: Assigning Mixes to Technical Products

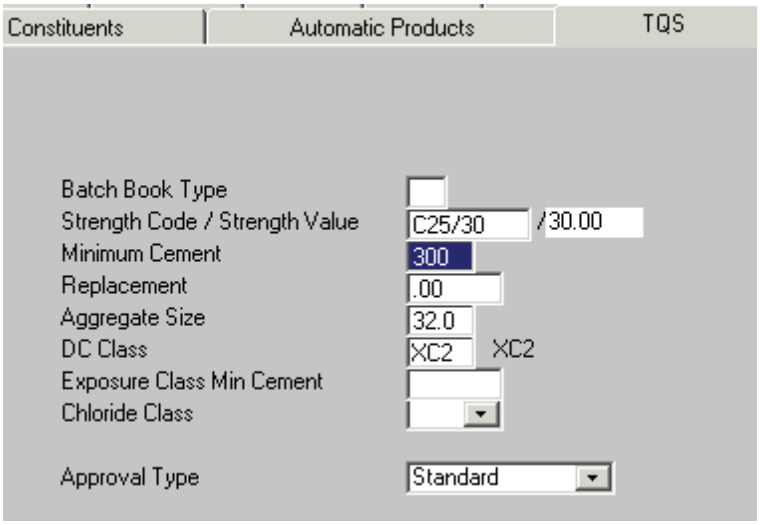
COMMANDseries has been modified to allow certain concrete classes and specifications to be associated with concrete technical products. When QC staff subsequently attempt to link specific mix designs with a technical product at a location, the system will validate the mix design against the classes and specifications.

Concrete Classes & Specifications

Previously, concrete class and specification data were restricted to users with TQS in the system license. With this modification, four types of specification information are now accessible through the Files > TQS Information menu:

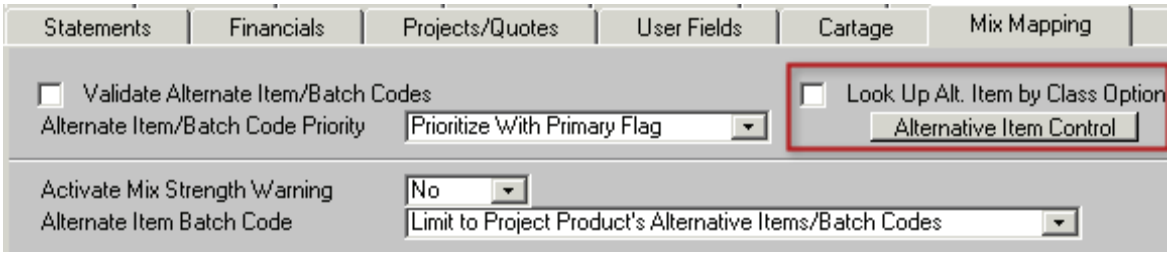
- **DC Classes** - Specifies Max Aggregate Size, Minimum Cement Content, and Maximum Water/Cement Ratio
- **Strength Codes** - Specifies the minimum allowed Strength
- **Batch Book Types**
- **Material Classes**

These records are edited in accordance with the required specifications. For each mix, the same fields are available on the TQS tab:



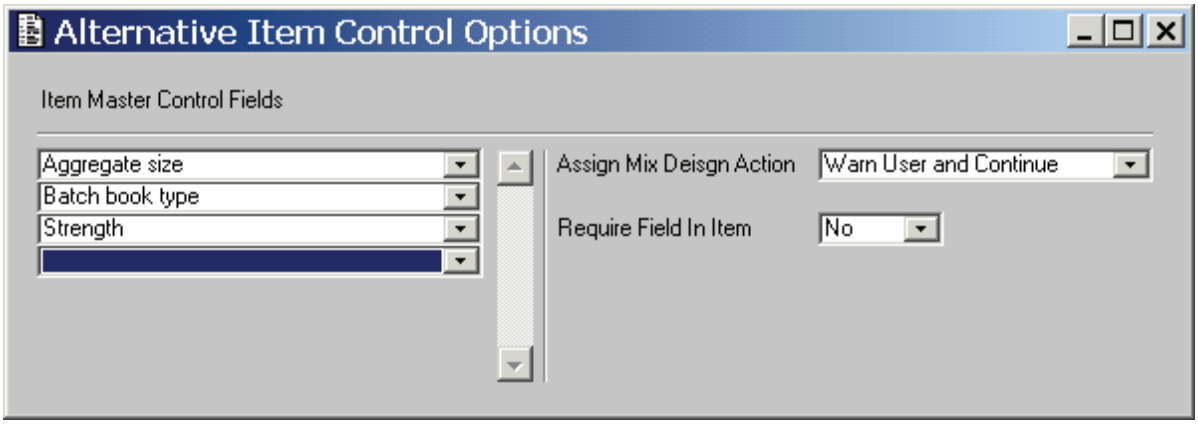
A new field, **Look Up Alt. Item By Class Option**, has been added to the Configuration-Mix Mapping tab. This option will force validation of the TQS item options in the lookup query for an alternative item.

A new button, **Alternative Item Control**, has also been added. Pressing this button calls the **Alternative Item Control Options** screen. This screen allows you to set the criteria for mixes assigned to technical products.



Item Lookup

If the Lookup Alternate Item by Class Option box is selected, then when a lookup is performed for an alternative item, the system will automatically filter the results using the criteria entered in the Alternative Item Control Options screen (see next).



Select a criterion from the drop-down list on the left. When you <Tab> out of that field, a new field will appear.

The options to the right of the screen apply to **all** selected criteria:

Assign Mix Design Action – This field determines what happens if a user attempts to link an invalid mix design to a product.

- Warn User and Continue
- Warn User and Stop Process
- Continue Without Warning (default)

Require Field in Item – If set to **Yes**, then all of the selected fields will be considered as required fields in the Items editor.

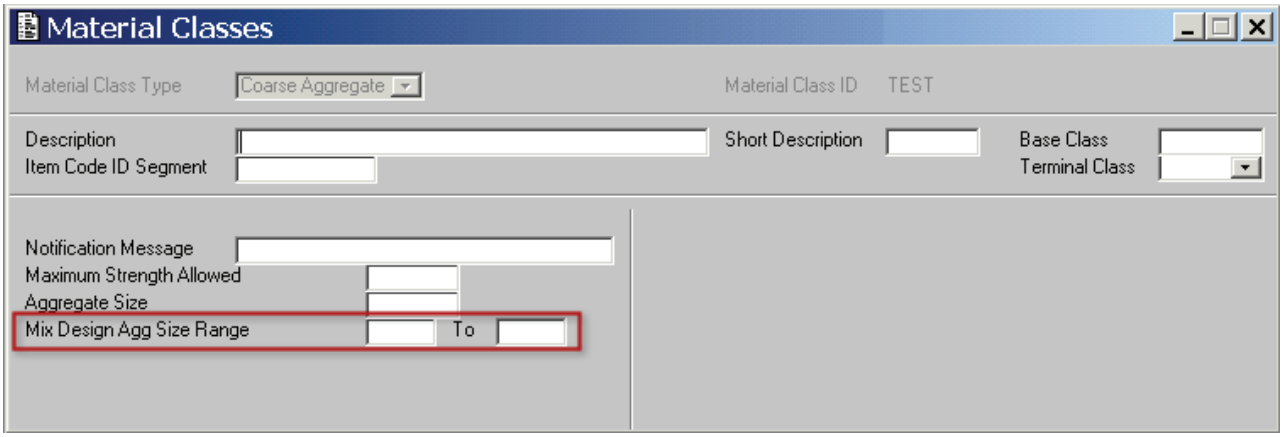
Reason Codes

Because the assigning of alternate items means that in some cases the rules will be overridden, reason codes will be needed to track them. A new **Reason Usage**, **Alternative Item Override**, has been added to the Reason Code editor. Create new codes as needed.

When the override is used, the reason code will be stored in a new field in the Alternate Item Batch Code table, **alternative_item_rsn_code.IMLB**.

Material Classes

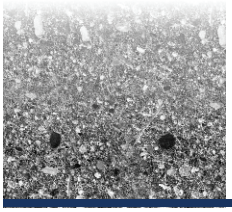
The Material Classes editor has been updated so that there are two new fields available for the Material Class Type Coarse Aggregate:



Items Editor

The Items editor has been updated so that values selected in the configuration option **Alternative Item Control** are validated when entering an alternative item. Null values for the parent item options will not be validated.

For example, if the alternative item control option **Strength Code** is selected, a comparison will be made between the parent item's strength code and the alternative item's strength code only if the parent item's strength code is populated. If the parent item's strength code is null, no comparison will be made for that value.



Appendix J: Validate Reused Concrete

When a truck returns with concrete on board, that mix can be reused on the truck's next load. This modification enables COMMANDseries to validate the reused concrete against several parameters to ensure that it can be safely used with the newly batched mix.

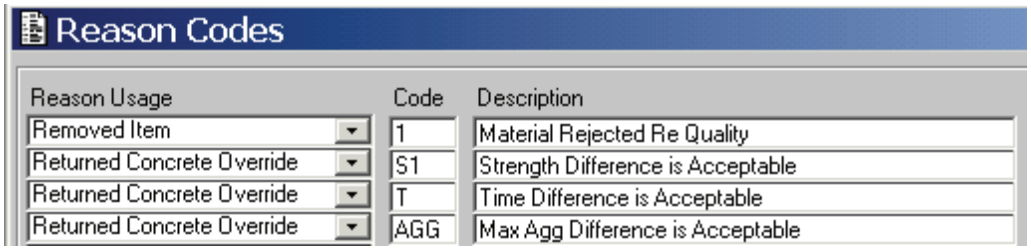
The three criteria available are:

- Strength
- Maximum Aggregate Size
- Difference in Load Times

Setup

Reason Codes

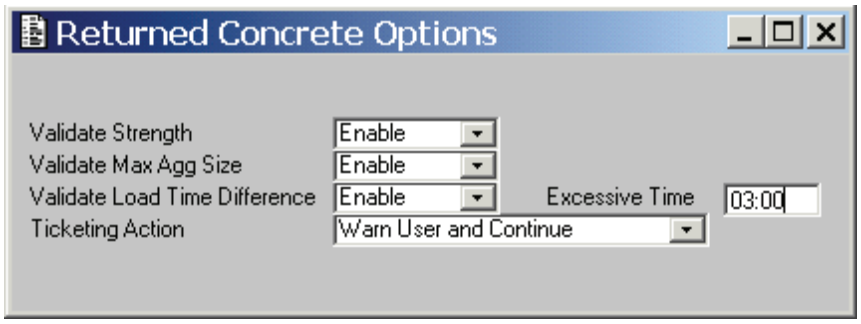
A new **Reason Usage**, **`Returned Concrete Override`**, has been created. If you intend to give users the ability to override a warning, you must create some reason codes with this new usage:



Configuration

A new button, **Returned Concrete Options**, has been added to the {Configuration > Dispatch tab}. This button calls the new Returned Concrete Options screen.

Returned Concrete Options (EDTROPT)

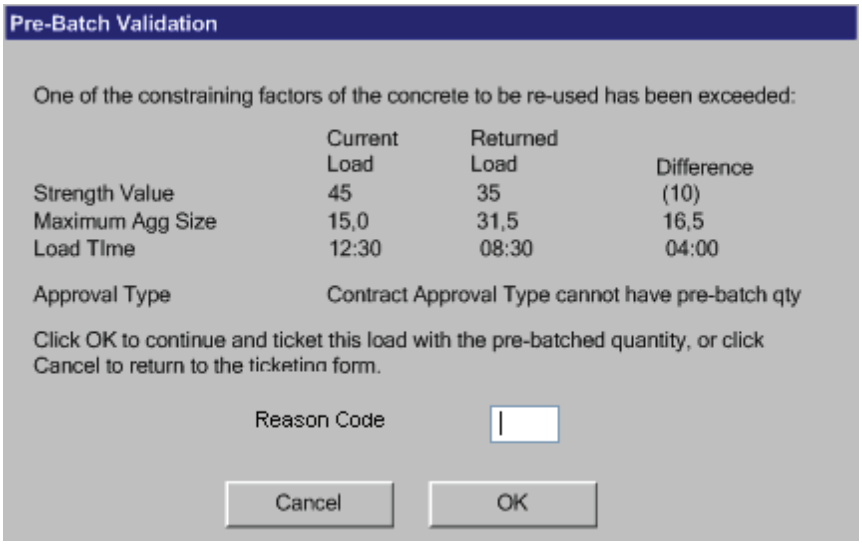


You can enable or disable validation of Strength, Max Agg Size, and Load Time Difference. If enabling the Load Time Difference, you will need to enter an Excessive Time value. This value represents (in hours:minutes), the maximum allowed difference between the batch time of the reused material and the load time of the new material.

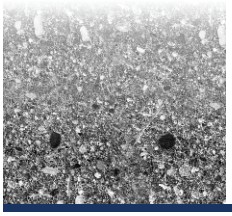
The validations will occur at ticketing. If the reused material fails any of the enabled validations, the **Ticketing Action** field determines the available options:

- **`Warn User and Continue`** – The system will warn the user and the user must decide whether to continue with ticketing.
- **`Warn User and Stop Process`** – Hard stop. The reused material cannot be ticketed on the current load; the dispatcher can attempt to use the pre-batched material on another load.

The system will inform the user of the specific reason for the validation failure. If the **Ticketing Action** field is set to **`Allow with Warning`**, a **Reason Code** field will display in the warning window.



Enter a valid reason code or detail on the field to select from a list, then press **OK** to proceed with ticketing.



Appendix K: Lime Spreader Functionality

Overview

Lime Spreader functionality is now available and configurable in CS08. You will be able to identify any additional hauler services and pay the hauler for those services as they relate to lime spreading. In addition, you can separate cartage payments for additional hauler activities, such as spreading lime. Previously, Lime business was limited to customers who had Terms Codes that allowed for Lime activities and all Lime functionality was limited to certain hardcoded user data.

- Lime business is now available for all companies.
- Lime can be made available for any customer and project.
- You can restrict customers and projects to Lime products only.
- SpreaderMan (or any other type of secondary hauler) can be paid separately from the main hauler. If the secondary hauler code is entered in Order Entry, a separate cartage payment for the secondary hauler will be created during the Update Cartage Ticket Process.
- Any changes in Prep that affect cartage will display on the SpreaderMan cartage ticket as well.

All hardcoded user data that was used previously for Lime has been eliminated; Lime functionality is now configurable:

- You no longer need to define a Lime Customer within the Terms Code editor. Item Groups within Customer/Projects and Items now provide this functionality.
- If you wish, you can set up a Item Category for Lime (such as 2610), but if you do so, service products can only be assigned to products beginning with the Item Category code (2610 in this case).
- In addition to SpreaderMan, any service addition can be added to any ticket.

Background

Lime is a product that is treated like aggregate in COMMANDseries. When specific Lime products are purchased, you must deliver another service: the actual Lime spreading. There are two terms you may wish to familiarize yourself with:

- **Delivery Hauler** - The truck actually used to deliver the Lime.
- **Spreaderman** - The entity/person actually spreading the Lime product. The Spreaderman will typically be paid cartage separately from the Hauler. With this enhancement, you can create two cartage charges (one for the Hauler and one for the Spreaderman) on one ticket.

General Notes

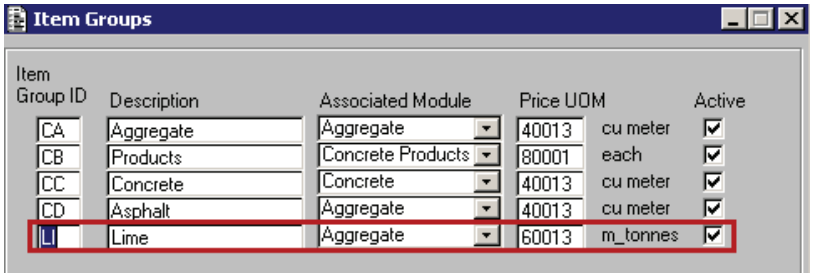
- Auto products (also known as service products, including Lime) that are set up for Lime items must also be entered on Projects for any location that might be used when **Restricted Project Products** is turned on for a Project. If there is any Item Code/ Location change to the auto product of an item, the same change must be made for any additional project that has with **Restricted Project Products** selected.
- Once the auto product is defaulted with the Lime item into Order Entry, from that point on the auto product will be considered an extra product. Therefore, if you remove the main product, the auto product can still be kept on the order line and the order can be created with the Lime product only. In addition, you can still remove the auto product after it has been defaulted to the order line.
- The auto product's quantity and price can be changed by the dispatcher who created the order. This information will appear on the ticket as well as the invoice.
- If the order is an FOB order and the auto product is added as an extra product, the system will not create a service cartage ticket. If one is needed, you will need to create a new order with only the auto product and set the **Delivery Type** as **`Delivered`**.
- Prep does not support the automatic addition of auto products at this time. You will need to manually add auto products to Prep that are related to Lime.

Items Set Up

Item Groups

The first thing you need to do is set up an Item Group {Files > Item Information > Item Groups} for Lime products. Lime is typically considered to be an aggregate product, so you should set the **Associated Module** to **`Aggregate`**.

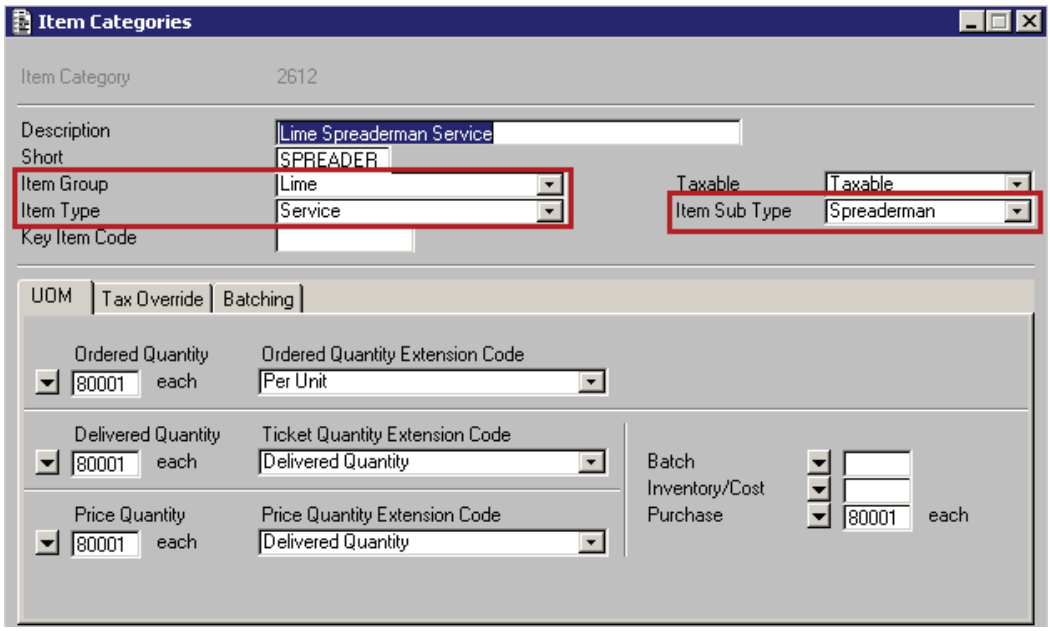
Item Groups (EDTCNFXS)



Item Category

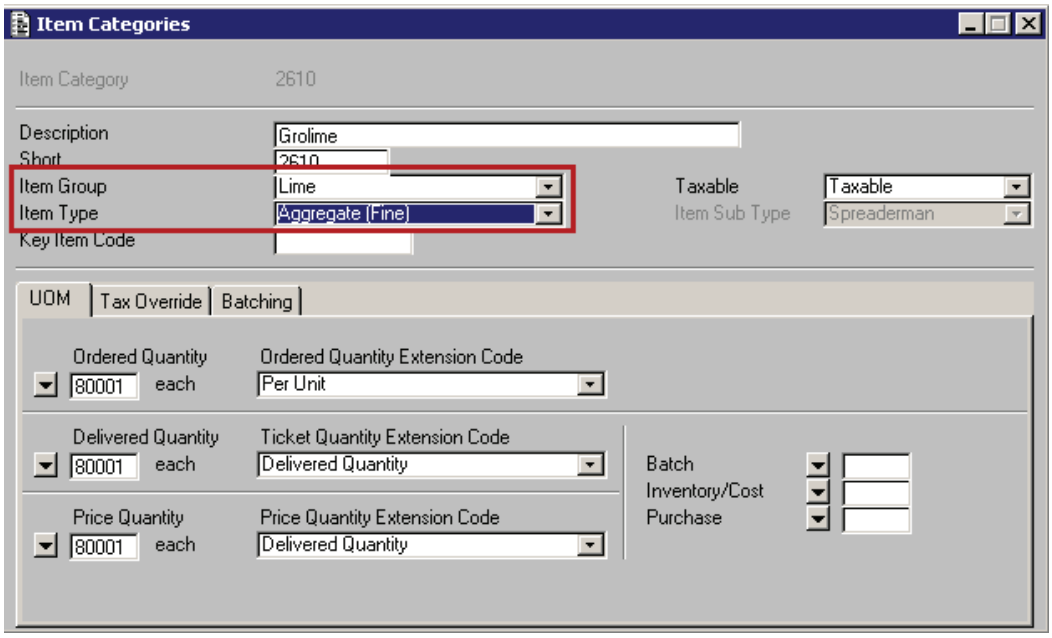
Now you can set up an Item Category {Files > Item Information > Item Categories} for Lime products. You will need two Item Categories for Lime products: the Lime product itself and a Lime delivery/service charge. To create the Lime delivery/service, set the **Item Group** to **`Lime`**, the **Item Type** to **`Service`**, and the **Item Sub Type** to **`Spreaderman`**.

Item Categories (EDTICAT)



Now, set up a Lime category that is not a service. Set the **Item Group** to **`Lime`** and the **Item Type** to **`Aggregate (Fine)`**. Now you will have two Item Categories for your Lime products: one that is a Service (such as spreading Lime) and one that is not (the actual Lime product).

Item Categories (EDTICAT)

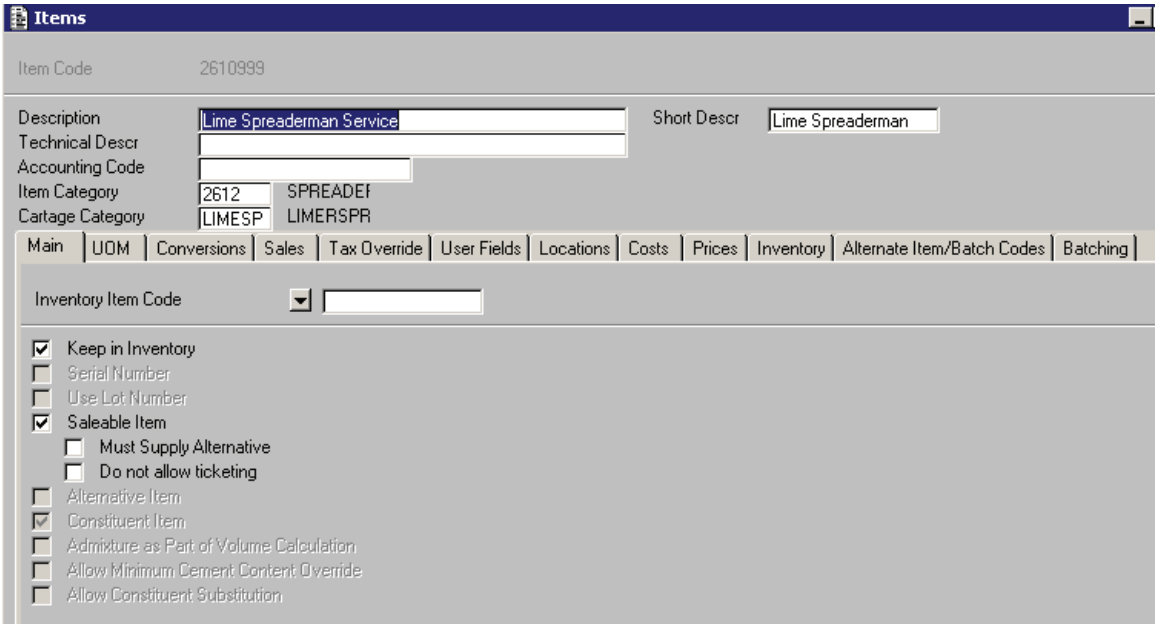


Items Editor

Service Lime items will be entered in the Item Master file as an item. If the Item Category is Service, the **Keep in Inventory**, **Saleable Item**, **Do not allow ticketing**, and **Constituent Item** flags will be available. You will not always need to use the **Keep in**

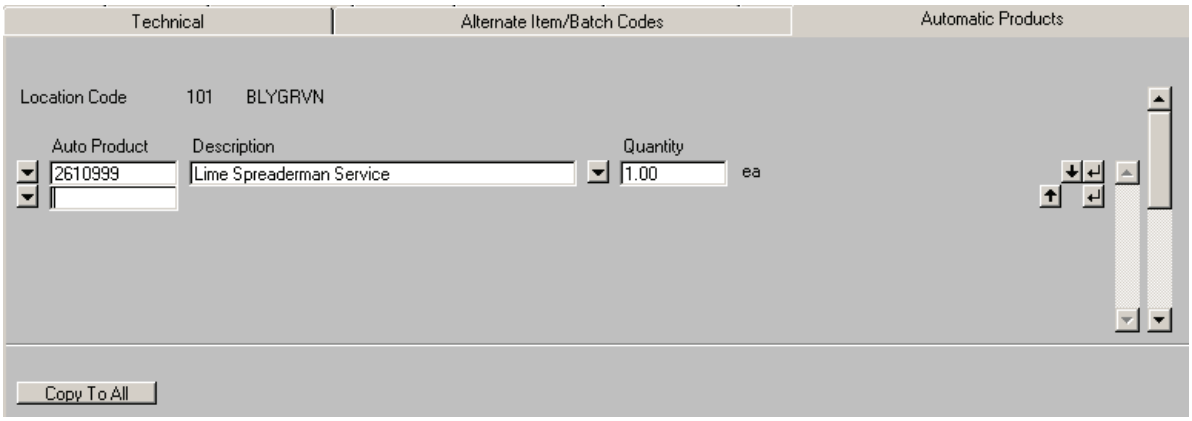
Inventory flag in the case of a Service Lime item, but it is there in case you have only a certain number of Lime spreaders available.

Items > Main tab (EDTIMST1)



Set up your service items first. Then, when you create the Lime product itself, you can add the spreader service as an automatic product. The Automatic Products tab displays for all Item Types except for **`Service`** and **`Extra Charge`**. This will apply to items in the Item Category you set up earlier for non-Service Lime items.

Items > Automatic Products tab (EDTIMSTH)



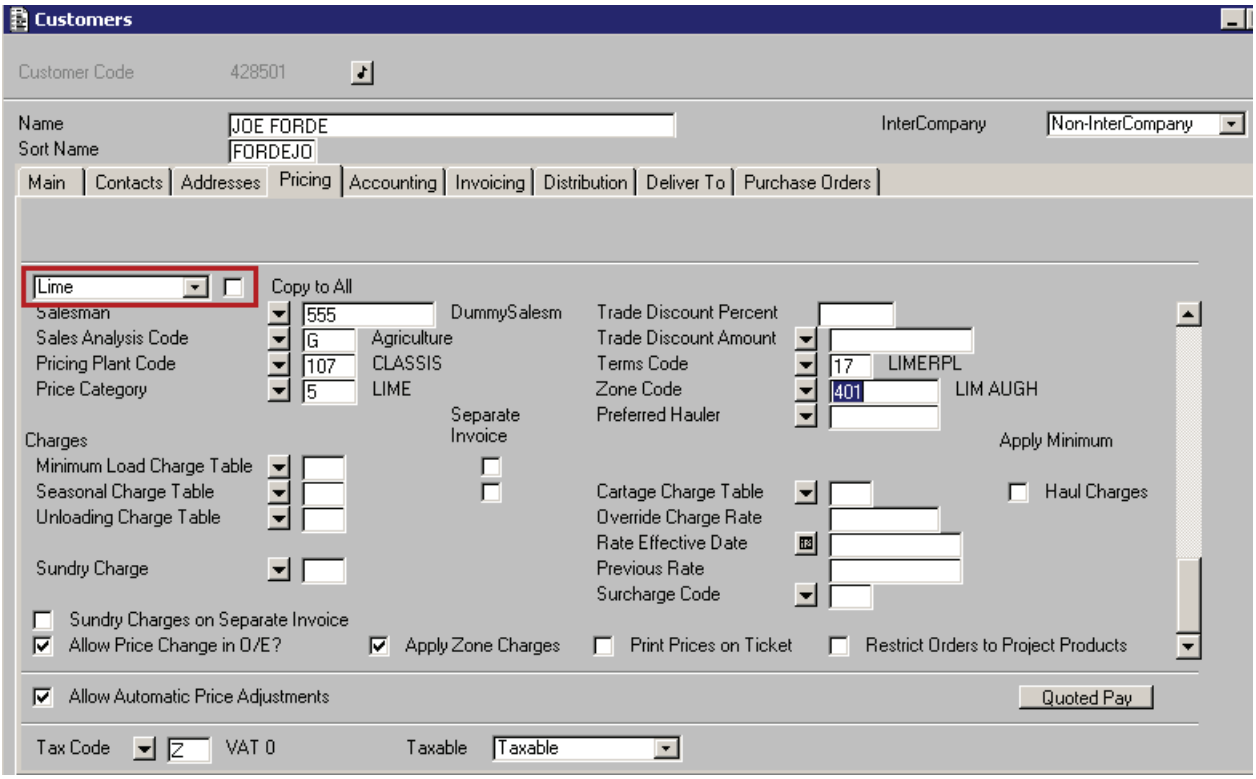
Reminders:

- Automatic Products are set up by location for available plants.
- Only non-mix products can be entered as auto products. If a mix product is entered, you will receive an error message.
- Only products that match the measurement system of the main product can be entered.
- If the quantity is anything other than blank, that quantity will be defaulted into Order Entry.

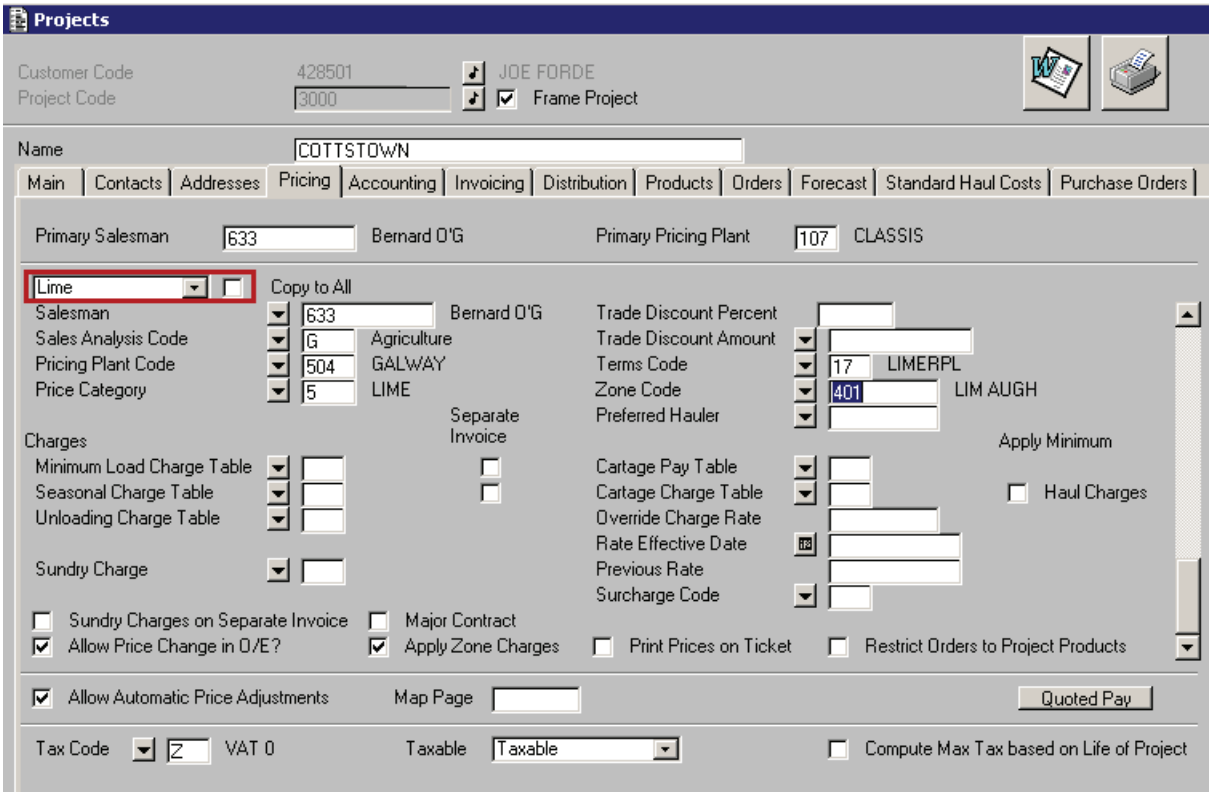
Assigning Item Groups to Customers and Projects

Finally, assign that Item Group to any Customer or Project that will have Lime delivery. You will also need to set up pricing information for the Lime here.

Customers > Pricing tab (EDTPRICE)



Project > Pricing tab (EDTPRICE)



You can set up Customers and Projects to restrict or allow Lime products from being associated with anything other than specific projects as you would any other Item Category: select **Restrict Orders to Project Products** on the Customers and Projects Pricing tab.

Note: Auto products will be restricted as well if you select this option.

If you want to restrict a Project to Lime products only, select only Lime for the Item Group.

Order Entry will automatically validate Lime products against Customers and Projects to ensure that the appropriate Item Type is entered for each Customer and Project on the current order. For instance, you will receive the below error message if the Item group does not match what is allowed for the Customer:

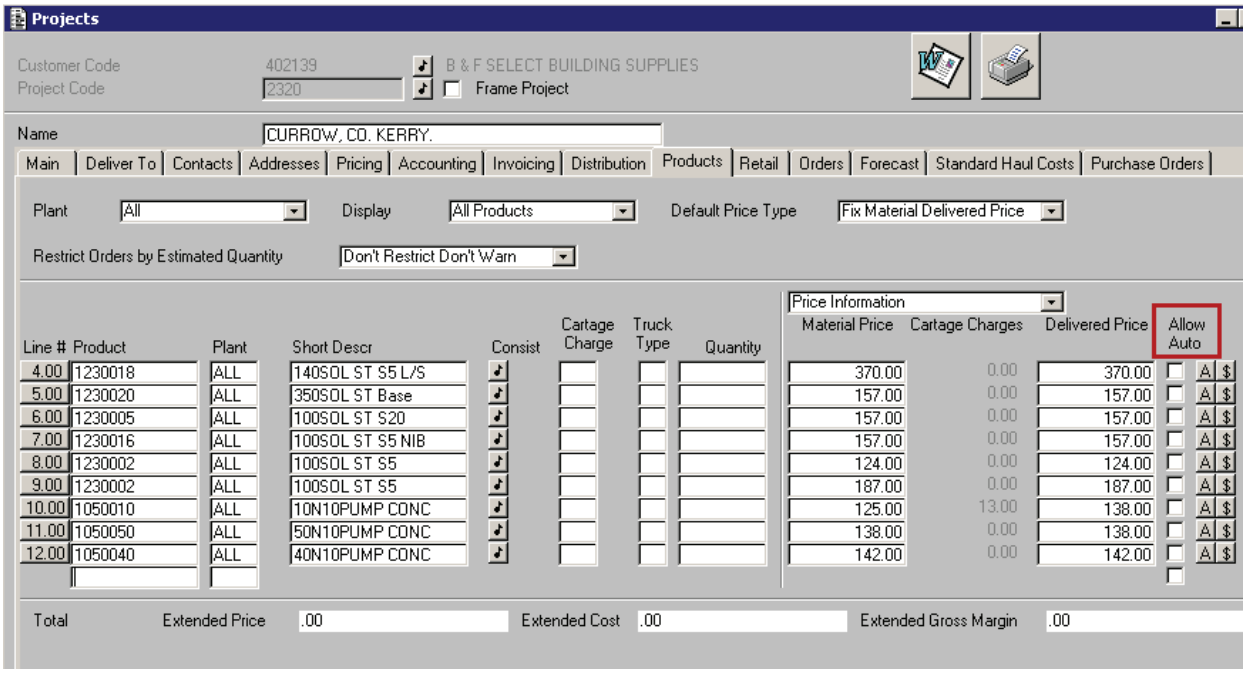
COMMANDconcrete
Item Group Concrete not found. The item group must be added to the Customer before the item may be entered.
OK

Projects Editor

Now you can begin to add your Lime products to Projects. The **Allow Auto** flag will be available for all Item Types except for **`Service`** and **`Extra Charge`** on the Projects > Products tab.

If the product has any auto product for any location, the **Allow Auto** flag will be checked.

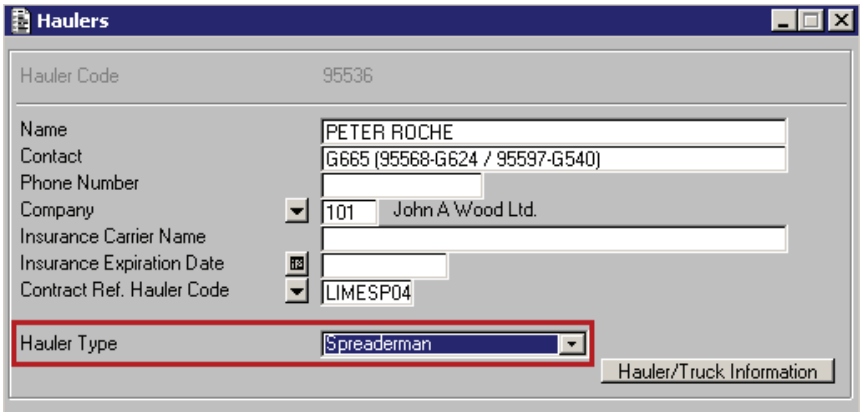
Projects > Products tab (EDTPRDL1)


Projects
Customer Code 402139 B & F SELECT BUILDING SUPPLIES
Project Code 2320 Frame Project
Name CURROW, CO. KERRY.
Main | Deliver To | Contacts | Addresses | Pricing | Accounting | Invoicing | Distribution | Products | Retail | Orders | Forecast | Standard Haul Costs | Purchase Orders
Plant All Display All Products Default Price Type Fix Material Delivered Price
Restrict Orders by Estimated Quantity Don't Restrict Don't Warn
Price Information
Line # Product Plant Short Descr Consist Cartage Charge Truck Type Quantity Material Price Cartage Charges Delivered Price Allow Auto
4.00 1230018 ALL 140SOL ST S5 L/S 370.00 0.00 370.00
5.00 1230020 ALL 350SOL ST Base 157.00 0.00 157.00
6.00 1230005 ALL 100SOL ST S20 157.00 0.00 157.00
7.00 1230016 ALL 100SOL ST S5 NIB 157.00 0.00 157.00
8.00 1230002 ALL 100SOL ST S5 124.00 0.00 124.00
9.00 1230002 ALL 100SOL ST S5 187.00 0.00 187.00
10.00 1050010 ALL 10N10PUMP CONC 125.00 13.00 138.00
11.00 1050050 ALL 50N10PUMP CONC 138.00 0.00 138.00
12.00 1050040 ALL 40N10PUMP CONC 142.00 0.00 142.00
Total Extended Price .00 Extended Cost .00 Extended Gross Margin .00

Hauler Editor

A **Hauler Type** drop-down field has been added to the Hauler editor {Files > Plant & Delivery Information > Haulers}. Select either **`Delivery Hauler`** or **`Spreaderman`**.

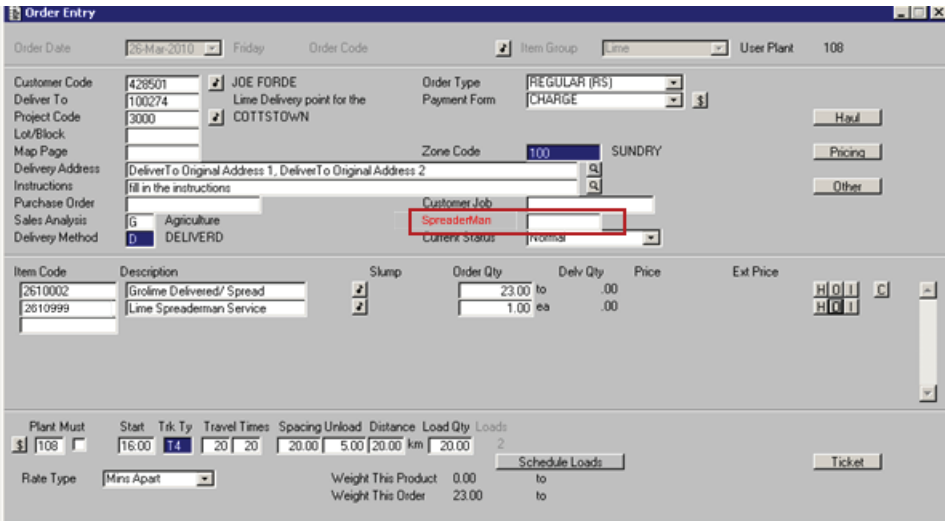
Haulers (EDTHLER)



Order Entry

If a product that has **Auto Allow** set in the Projects > Products tab is entered on the order line, the auto product will be automatically added as an extra product, as in standard functionality.

Order Entry (EDTCORD)



- If multiple products in multiple tabs have the same service product, each should be entered in the related tab even though they are the same product.
- If one tab has a mix product and an extra product, they will both have the auto product as the same service product. One auto product will be defaulted.
- If the service product's item **Sub Type** is **`Spreaderman`**, the **Hauler** field on the Order Header or Order Detail will be relabled **Spreaderman**.
  - If the **Hauler Code `Spreaderman`** is in the Order Information line, one Spreaderman product will be enough for the entire order to turn the **Hauler** label to **Spreaderman**.
  - If the **Hauler Code `Spreaderman`** is at the schedule line, turning the **Hauler Code** label to **Spreaderman** will depend on whether or not the individual tab contains a Spreaderman service.
  - If the **Hauler Code** is changed to **Spreaderman**, only Spreaderman haulers will display if you detail on the field.
  - The **Spreaderman** field in Order Entry is required for entry.
- If there is a service type of a **`Spreaderman`** item on the Order Line, the **Hauler Code** must be entered as **`Spreaderman`** in either the Order Header or the Order Schedule, based on the order's set up. If you select a Hauler that does not have a **Type** of **`Spreaderman`**, you will receive an error message: *Schedule has Service/Spreaderman item; you must select Spreaderman Hauler Type*.

Cartage Changes

Cartage Sequence Code

Cartage **Sequence Code** has been added to the Cartage Ticket table (**`CTTK`**) as well as all associated child tables. This sequence code allows you to have multiple cartage charges on one ticket. If you enter an existing Sequence Code on the Cartage Ticket Edit screen, the

application will retrieve the existing cartage charges. If the Sequence Code does not exist, you will receive an error message. To add a new Sequence Code, you must tab out of the cartage **Sequence Code** field; the application will assign the next Sequence Code.

Note: All cartage tickets created on this screen will begin with the number 1. If you enter a number in the **Sequence Code** field that does not exist, a blank editor will display so you can manually create a Cartage Ticket.

Removing an Original Cartage Ticket

If a ticket is removed and an additional Cartage ticket exists for the same order with a different sequence code, you will receive a message: *There are multiple cartage tickets for this original ticket. Would you like to remove these also?*

- Select **Yes** to remove all cartage tickets that match the **Order Date**, **Order Code**, and **Ticket Code**.
- Select **No** to remove only the active ticket.
- Select **Cancel** to return to the original editor with the ticket loaded.

Update Cartage Ticket Changes

The Update Cartage Ticket process creates an additional cartage ticket for Service products. If the cartage ticket is created from Update Cartage Ticket, the ticket information will be stored internally; if the ticket is created manually, the information will not be stored.

Note: New fields for the **Order Date**, **Order Code**, **Ticket Code**, and **Internal Order Line Number** (for the cartage ticket) have been added to the **CTTK** table.

- Another cartage ticket will be created for a second product that has a Spreaderman Hauler Code and will overwrite the Hauler Code of the ticket that comes from the truck.
- TLAC records will be created with the selected cartage Item Codes for the order lines.
- The Cartage Update error list will display tickets for Service products, even if the main ticket has an FOB truck.
- Sequence Codes are assigned to each cartage ticket by application; therefore, the Order Date, order Code, and Ticket Code will remain the same.

Example

2610002 is a Lime product; 2610999 is a service product.

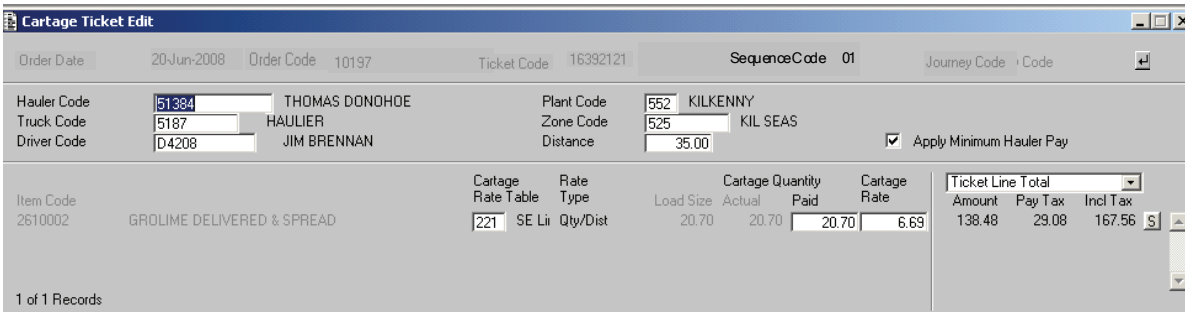
A user creates an order for 2610002; 2610999 is an auto product and defaults to the order line once the main product (2610002) is entered.

Since 2610999 is a Service/Hauler product, the Hauler Code is required on the order line.

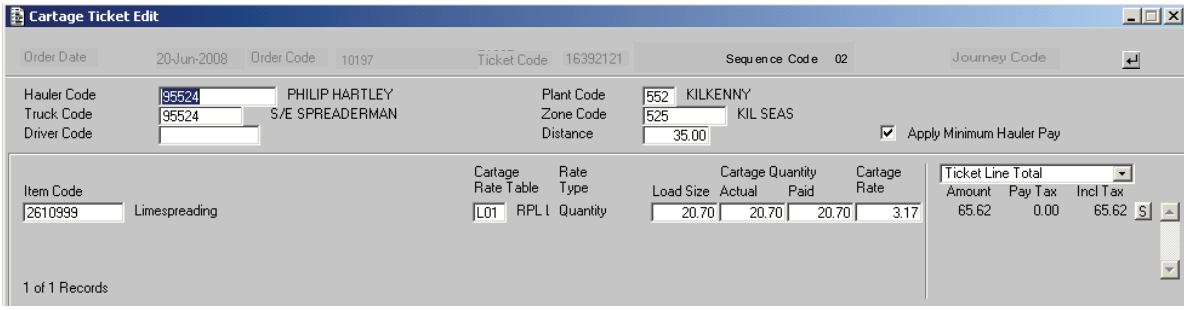
A ticket is created with the service product.

The system will check to see if all cartages are available for the ticket lines by comparing ticket information to the cartage ticket table (**CTTK**) for each record. If no matches are found, the Update Cartage Status will be left alone.

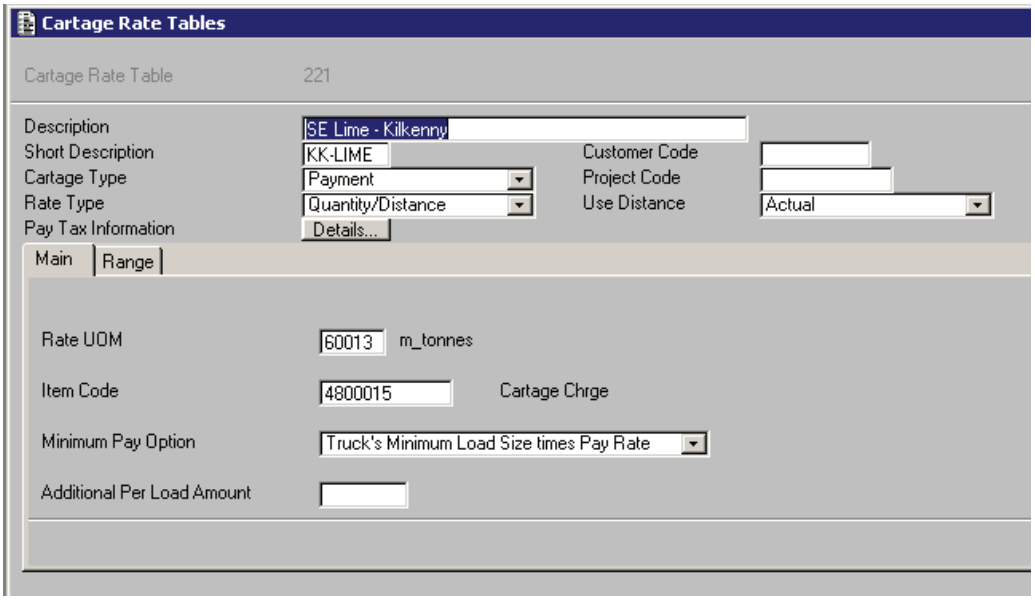
Cartage Ticket Update is run. One ticket will be created for product 2610002 for the truck that is used in ticketing along with its Hauler.

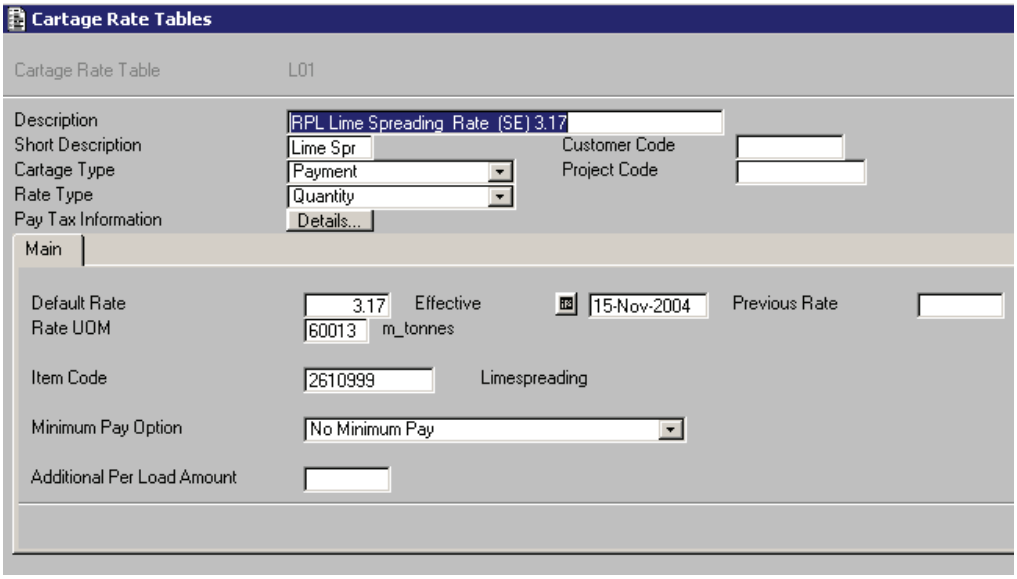

Cartage Ticket Edit
Order Date 20-Jun-2008 Order Code 10197 Ticket Code 16392121 SequenceCode 01 Journey Code Code
Hauler Code 51384 THOMAS DONOHOE
Truck Code 5187 HAULIER
Driver Code D4208 JIM BRENNAN
Plant Code 552 KILKENNY
Zone Code 525 KIL SEAS
Distance 35.00
Apply Minimum Hauler Pay
Item Code
2610002 GROLIME DELIVERED & SPREAD
Cartage Rate Table 221
Rate Type SE Li Qty/Dist
Cartage Quantity Load Size 20.70 Actual 20.70 Paid 20.70
Cartage Rate 6.69
Ticket Line Total Amount 138.48 Pay Tax 29.08 Incl Tax 167.56
1 of 1 Records

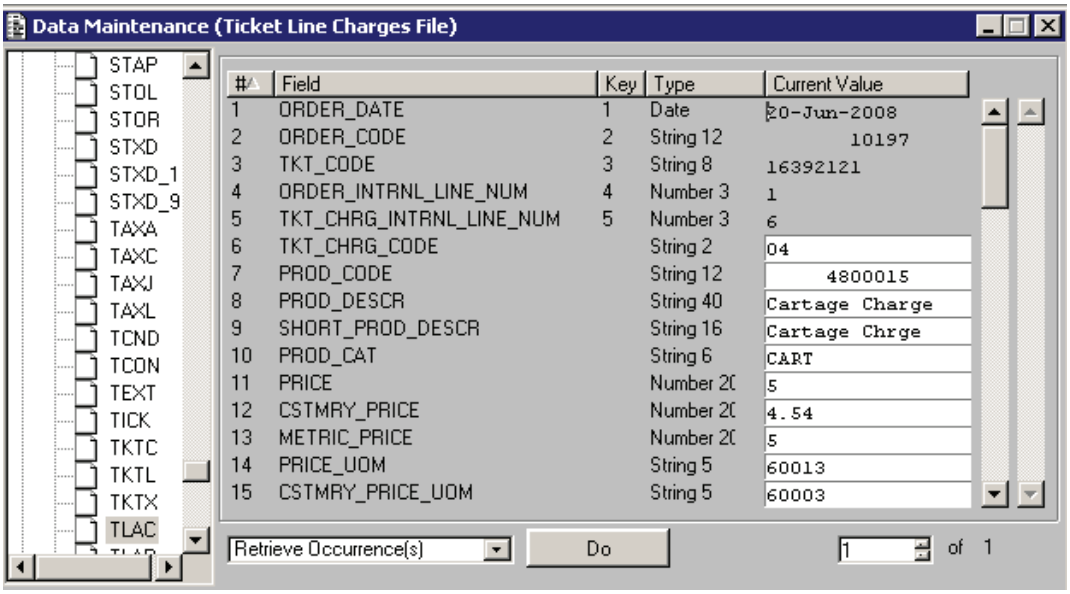
Another cartage ticket will be created for the service product. The Hauler and truck will be taken from the Spreaderman preferred hauler.

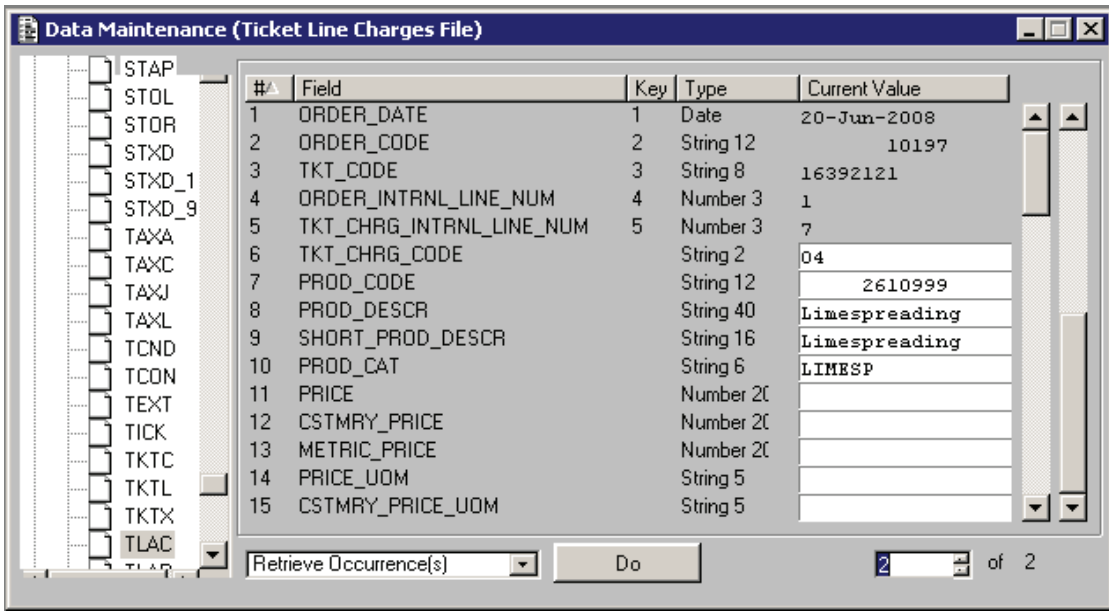

Cartage Ticket Edit
Order Date 20-Jun-2008 Order Code 10197 Ticket Code 16392121 Sequence Code 02 Journey Code
Hauler Code 95524 PHILIP HARTLEY
Truck Code 95524 S/E SPREADERMAN
Driver Code
Plant Code 552 KILKENNY
Zone Code 525 KIL SEAS
Distance 35.00
Apply Minimum Hauler Pay
Item Code 2610999 Limespreading
Cartage Rate Table L01
Rate Type RPL Quantity
Cartage Quantity Load Size 20.70 Actual 20.70 Paid 20.70
Cartage Rate 3.17
Ticket Line Total Amount 65.62 Pay Tax 0.00 Incl Tax 65.62
1 of 1 Records

In the above examples, cartage rates have Item Codes for 221 and L01. TLAC records for these cartage tickets will be created from those Item Codes.




Cartage Rate Tables
Cartage Rate Table
L01
Description
RPL Lime Spreading Rate (SE) 3.17
Short Description
Lime Spr
Customer Code
Cartage Type
Payment
Project Code
Rate Type
Quantity
Pay Tax Information
Details...
Main
Default Rate
3.17
Effective
15-Nov-2004
Previous Rate
Rate UOM
60013
m_tonnes
Item Code
2610999
Limespreading
Minimum Pay Option
No Minimum Pay
Additional Per Load Amount

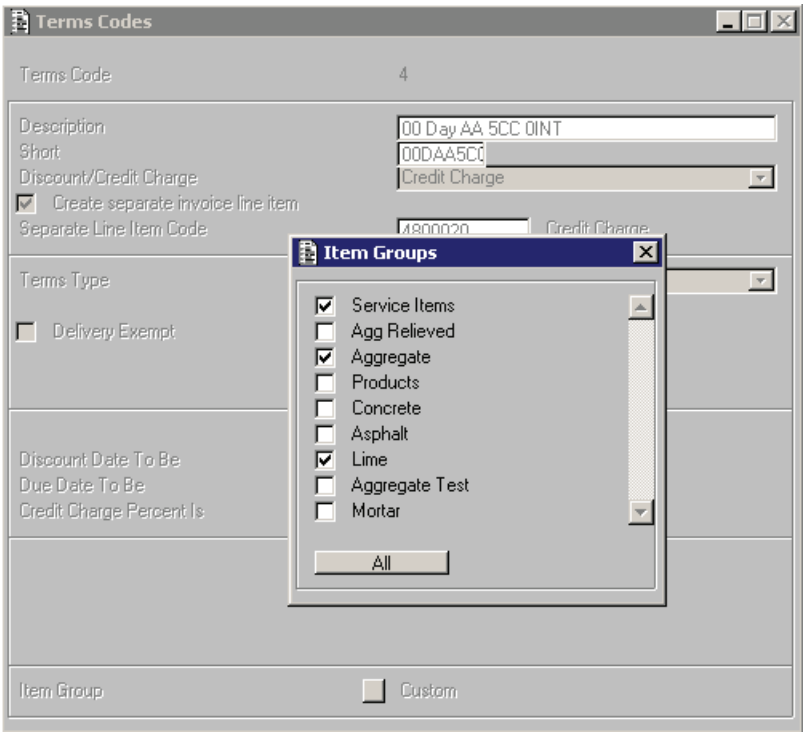

Data Maintenance (Ticket Line Charges File)
STAP
STOL
STOR
STXD
STXD_1
STXD_9
TAXA
TAXC
TAXJ
TAXL
TCND
TCON
TEXT
TICK
TKTC
TKTL
TKTX
TLAC
Field Key Type Current Value
1 ORDER_DATE 1 Date 20-Jun-2008
2 ORDER_CODE 2 String 12 10197
3 TKT_CODE 3 String 8 16392121
4 ORDER_INTRNL_LINE_NUM 4 Number 3 1
5 TKT_CHRG_INTRNL_LINE_NUM 5 Number 3 6
6 TKT_CHRG_CODE String 2 04
7 PROD_CODE String 12 4800015
8 PROD_DESCR String 40 Cartage Charge
9 SHORT_PROD_DESCR String 16 Cartage Chrge
10 PROD_CAT String 6 CART
11 PRICE Number 2(5
12 CSTMRY_PRICE Number 2(4.54
13 METRIC_PRICE Number 2(5
14 PRICE_UOM String 5 60013
15 CSTMRY_PRICE_UOM String 5 60003
Retrieve Occurrence(s)
Do
1
of 1



Terms Code Modifications

To allow for discounts, Item Groups can be selected in the Terms Codes editor.

Terms Codes editor (EDTTRMS)



Click on the **Item Group** selector button at the bottom of the Terms Codes screen to bring up the Items Group screen which displays all available Item Groups. You can add as many

active Item Groups to the associated Terms Code. Select **Lime** for any Terms Codes you wish to be associated with the Lime Item Group you set up earlier.

Edit Orders and Tickets

The following standard functionality rules apply when an auto product record is manually added to an order in Edit Orders and Tickets:

- You can remove the auto product from the Order Line if necessary.
- If the default quantity of the auto product in the **IMST** file is NOT zero or blank, the quantity will be defaulted in the Order Line (**DFLT_LOAD_QTY.ORDL**) and the UOM will be defaulted to the Order Line (**DFLT_LOAD_QTY_UOM.ORDL**) as well.

  If the default quantity of the auto product in the **IMST** file is zero or blank, the main product's load size quantity will be defaulted if the UOM is the same as the auto product; otherwise, you can enter the quantity yourself.
- If the customer needs to have the **Hauler Code** at the schedule line, the **Hauler Code** will be updated in Prep as well and will be saved in the order table.
  - Cartage Update will look at the schedule line; if it is blank, the system will retrieve the **Hauler Code** (which in this case will also be the Spreaderman) from the order table.
  - If you change the **Hauler Code** on an existing order, the **Hauler Code** will be set in the order header. In addition you will receive the following message:

    Hauler Code setup is in the schedule line. Changing the Hauler Code will not affect the Hauler Code in the schedule line. User will need to edit Hauler Code in Order Entry to put the new Hauler Code in effect. OK.

    The system will then only update the **Hauler Code** in the order table.
- When an existing order is retrieved in Order Entry, the **Hauler Code** setup is located in the Schedule Line, and the **Hauler Code** in the Schedule line is null (with the **Hauler Code** in the Order Header not null), the **Hauler Code** will be defaulted from the order table for all schedules. You can edit based on your user privileges.

Appendix L: Quantity Discounts

Overview

COMMANDseries now supports quantity discounts. The discounts are established at the price category level, and are based on ordered or projected quantities.

Configuration

Configuration involves two main editors:

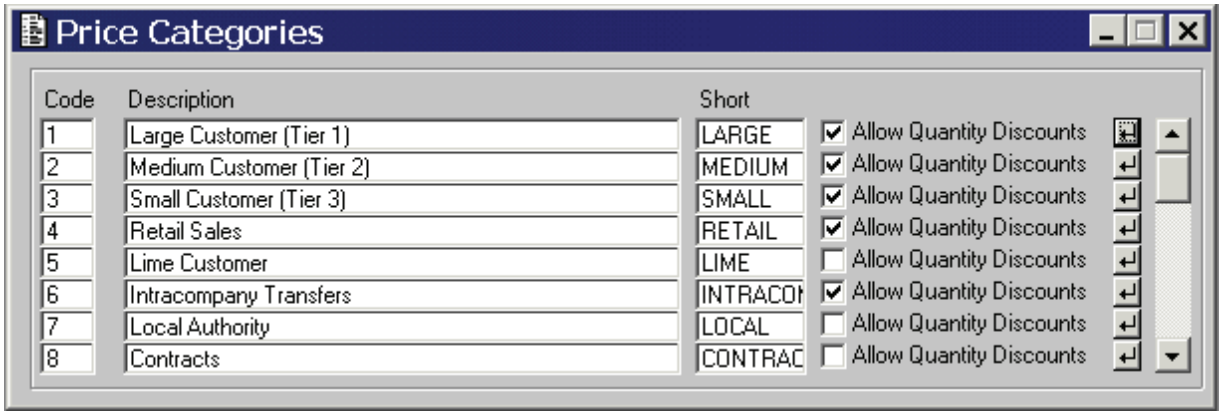
- Price Category
- Items

Once configured, discounts are applied automatically in Projects, Order Entry, and Aggregate Ticketing.

Price Categories

A new checkbox, **Allow Quantity Discounts**, has been added to the Price Categories editor.

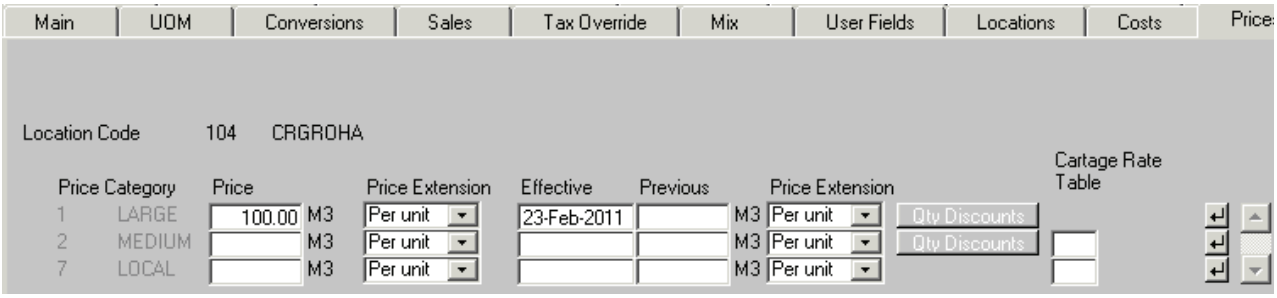
Price Categories (EDTPCAT)



Enable the field for all price categories for which you may want to use quantity discounts.

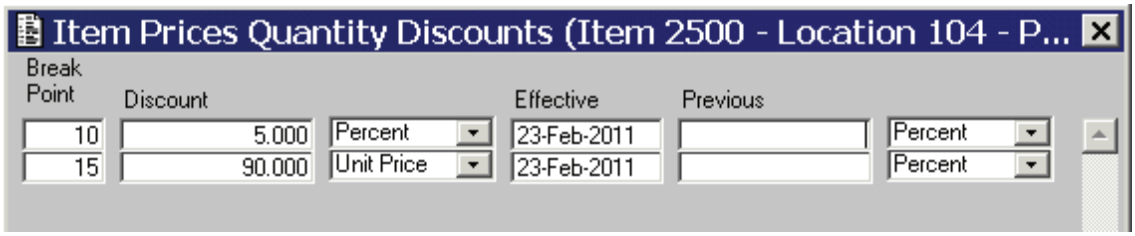
Items

When price categories are assigned to an item, the system will validate the **Allow Quantity Discount** field. If it is enabled, a **Qty Discounts** button will display.



Pressing this button will open the Items Prices Quantity Discounts screen.

Item Prices Quantity Discounts (EDTIMSTI)



To establish a quantity discount:

1. Enter a **Break Point**. An ordered quantity greater than this amount will trigger the discount.
2. Enter the **Discount** and **Discount Type**. The discount can be either a percentage off the standard unit price for that price category, or a new unit price. The current date will default as the **Effective** date; change the value if necessary.

   If you change an existing discount, the replaced Discount and Discount Type values are automatically moved to the **Previous** section.
3. Press F6 (Add Occurrence) to add an additional discount, or accept the screen to return to the Item-Prices tab.

In the above screen shots, the default price is 100. If the Ordered Quantity is greater than 10 and less than or equal to 15, the material price will be discounted by 5%, to 95. If the Ordered Quantity is greater than 15, the material price will be changed to 90.

Workflow

Projects

Quantity discounts are validated when entering products on the Projects-Retail tab. No user intervention is required.

Order Entry

Quantity discounts are validated during order entry, whether in Concrete Order Entry or Aggregate Ticketing. No user intervention is required.

Invoice Prep

Quantity discounts are based solely on order-level ordered quantities. If a customer gets a quantity discount, but ends up receiving an amount less than the break point, the discounted price will remain on the order unless the ordered quantity is updated.

Index

A

Associated Products 51
Auto Caller ID 407
- Configuration 407
- Contact-Deliver To Customer Order Lookup 410
- Manual Lookup 410
- Workflow 408

Automated Data In/Out 351

B

Bank Codes 247
Batch Code Generator 314
Batch Interface Queued Tickets 314
Batching for Third Parties 387
- Third Party Company Document Formats 390
- Third Party Customer Projects 389
- Third Party Customers 388

C

Calculate a Price Change 310
Cartage Operations
- Update Cartage Tickets 237

Cash Management
- Order Entry 251

COD Calculator 71
COD Recap Report 295
Comm Manager Console 375
COMMANDconcrete Reports 283
COMMANDseries
- .NET FNDCODE 24
- Accepting or Saving a Screen 20
- Accessing Help 18
- Add or Insert Occurrence 20
- Calendar Function 31
- Detailing on a Field 21
- Entering Master File Information 17
- Exiting COMMANDseries 17
- Logging into COMMANDseries 17
- Setting Up the System 16
- SmartLookup Screens 22
- Starting COMMANDseries 16
- Using the Tab Key 19

Constituent Replacement Log 343
Credit Checking 392
- Assigning Customer Credit Codes 396
- Configuration 394
- Credit Codes 394
- Reason Codes 395
- Using the Credit Checking Function 397

Customer Notes 272

Deleting, Managing & Purging Completed Notes 281
Entering Notes 273
Managing Customer Notes 276
Notes Listing 277
Types of Notes 272
Customer-Project-Order Lookup 70
Customers
Update Unctive Customers 319

D

Data Maintenance 353
Global Replace 357
Retrieving Records 355
Special Search Operators 358
Data Management 345
Automatic Database Updates 358
Database Locks 373
Export Data 348
Export Orders and Tickets 350
Import Data 346
Import Orders and Tickets 349
Initialize/Analyze Files 345
Manual Database Updates 362
Service Control 374
SQL Worksheet 372
Dispatch Memos in Order Entry 278
Dispatching Examples
Multiple Loads on One Truck 380
Scheduling an Order out of Multiple Plants 383
Two Products on One Truck 382
Dispatching Reports 290
Batch Info Report 300
Batching Comparison Report 300
COD Recap Report 295
Customer Sales Recap Report 298
Dispatch Sheet 289
Driver Callout Report 288
Inventory Usage Report 298
Order Audit Log Report 301
Order Recap Report 297
Order Report 291
Plant Loading Report 288
Plant Production Report 298
Product Sales/Usage Report 299
Raw Materials Requirements Report 299
Ticket Reports 291
Truck Demand Graph 287

E

Edit Orders and Tickets 205
Credit & Debit Memos 220
Display Taxes 227
Edit Orders & Tickets Screen 205
General Order and Ticket Prep 206
Options Menu 224
Edit Project Expiration Dates 315

Entering Dates 19
Error Log Report 318

I
Initialize TESYS Data 313
Invoicing 229
  Calculate Unloading Charges 235
  Create Orders for Separate Invoices 236
  Reconciling Tickets 230
  Update Costs & Prices for Orders & Tickets 233

J
Journeys
  Creating a New Journey 79, 106
  Editing an Existing Journey 81, 108
  Ticketing a Journey 81, 108

L
Lien Legacy Invoice Manager 315

M
Manual Database Updates 362
  Maintenance Routines 369
  Upgrade Options 363
Material Manager 322
  Generic Mix 339
  Item Substitution 341
  Mix Design 335
  Screen 326
  Setup 322
Mix Design 335
  Interface 313, 404
  Order-Level 87, 400, 401
  Order-Level Ticketing 405

O
Order Entry 32
  Adding or Entering Products on an Order 43
  Associated Products 51
  Copying and Moving Orders 74
  Creating Standing Orders from Projects 67
  Customer-Project-Order Lookup 70
  Economic Sourcing 100
  Entering a Standing Order 65
  Entering Other Order Information 41, 211
  Forecasted Shipped Quantity 52
  Options Menu 95
  Order Haul Information 38, 212
  Order Hold Functions 84
  Order Pricing Information 39, 209
  Order Types 75
  Other Order Line Information 50
  Product Sales Option 90
  Removing or Reactivating Orders 73
  Round Trip Trucking 77
  Schedule Standing Orders 67
  Scheduling an FOB Order 61
  Scheduling an Order 54

Simplified Order Entry 61
Standard Order Entry 34
Standing Order Entry 64
Suggested Shipping Plants 76
Switching Order Files for Order Lookup 66
Units of Measure 73
Updating Projects from Order Entry 73
Using the COD Calculator 71
Order Tree 92
Order Types 75

P

Payment Option Reports
Unallocated Receipts Report 308
Uncollected Tickets Report 308
Preliminary Invoice Register 188
Printing a Detail Preliminary Invoice Register 193
Printing a Priced Orders Report 189
Printing an Exceptions Report 192
Product Sales Option 90

R

Realign Accounts and Cost Centers 316
Rebates & Royalties
Reporting 130
Reports
Generating Reports 283
Scheduling Reports 286
Time Analysis Reports 301, 303, 307
Round Trip Trucking 77

S

Saving Report Configurations 188
Scheduling
Journeys 79, 105
Optimization 58
Scheduling Reports
Order Schedule Report 286
Simplified Orders 61
Standing Orders
Scheduling 67
Standing Order Entry 64
Suggested Shipping Plants 76
Suspended Orders & Tickets Report 201
Suspending Orders and Tickets 199
Automatic Customer Suspension 201
Editing Suspended Tickets on Invoiced Orders 203
Exception Suspension 201
Manual Suspension 200
Releasing Suspended 202

T

Tasks, Conditions, & Driver Overtime 180
Conditions 181
Deadheading 183
Driver Overtime 180
Managing Driver Overtime 184

Tasks 180
Ticketing 182
Tracking & Scheduling 182
Ticketing 133
Canceling Tickets 139
Load Size Logic 138
Maximum Gross Truck Weight 141
Reprinting Tickets 138, 225
Ticketing Screen 135
Ticketing, Prebatched Material 140
Time Analysis
Missing Times Report 305
On Time Delivery Report 303
Order Snapshot Report 302, 307
Overtime Report 306
Time and Task Manager 184
Driver Times 187
Ticket Times 185
Truck Times 186
Transfer Orders Register 195
Truck Ahead-Behind 414
Configuration 415
Truck Counts Screen 82
Truck Unavailability 78

u

Update Costs & Prices for Orders & Tickets 233
Update Zone Salesman 318

v

Volume Calculator 72